General User's Manual

Thai CDC

Establishing a New Client/Donor/Partner
Communications & Project Tracking Tool

Team #: 01

12/05/11

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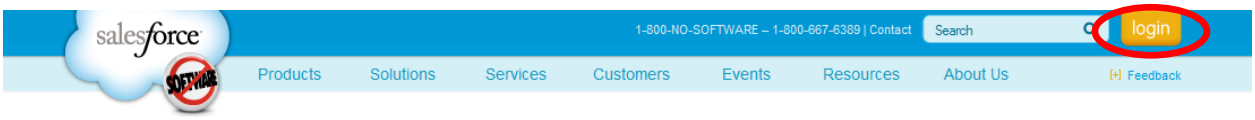
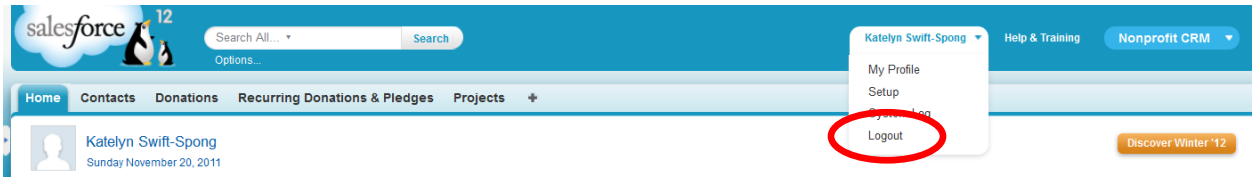
Logging In/Out

To log in, go to www.salesforce.com and click the “Login” button in the upper right corner.



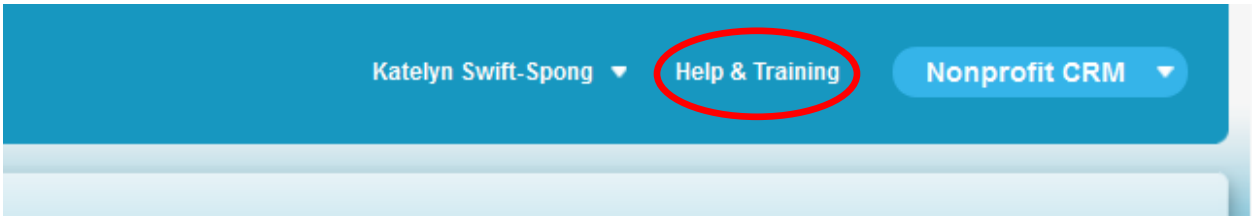
Next, enter your username and password and click “Login”.

To log out of the system click on your name in the upper right corner. This will bring up a dropdown menu with “Logout” at the bottom. Click on “Logout”.



Accessing Help and Training

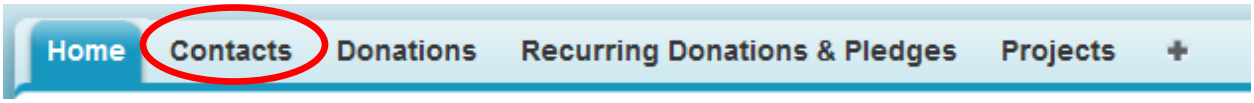
As this manual only covers some of the functionalities of Salesforce, more information can be found either at http://success.salesforce.com/, or by accessing the “Help & Training” documentation by clicking on this button in the upper right corner.



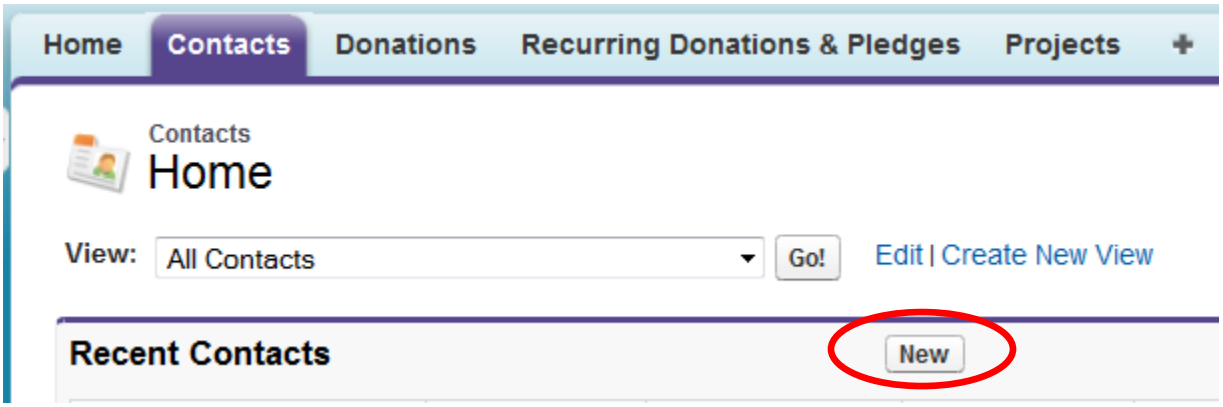
Contacts

Adding Contacts

In order to add a contact, click on the “Contacts” tab.



Next to “Recent Contacts” click on “New”.

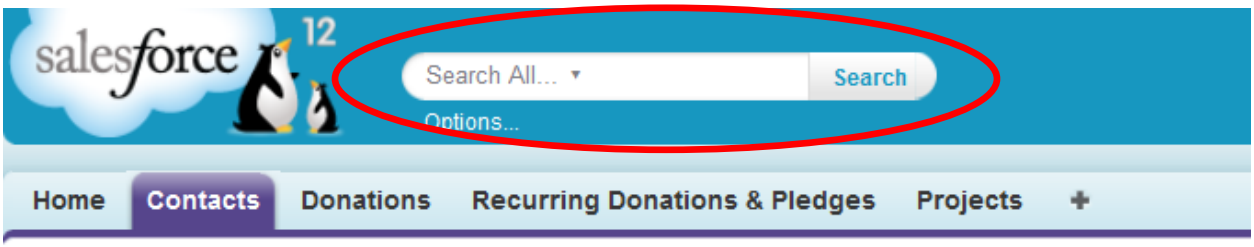


Fill in all available contact information and then click the "Save" button. Note that if no organization name is specified, a new organization with the same name as the contact will be created. The contact will be assoaicated with this new organization of one person.

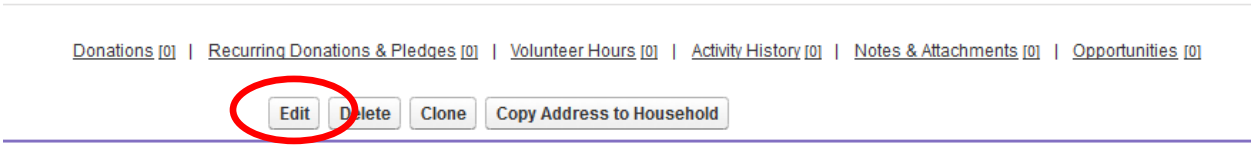
Editing Contacts

In order to edit an existing contact, open the contact's page. This can be done in two ways.

1. One is by clicking on the "Contacts" tab and then finding the contact using a View (see Filtering Contacts below for information about how to create views.
2. The other way to find a contact is by typing in the contact's name in the search bar at the top left of the page.



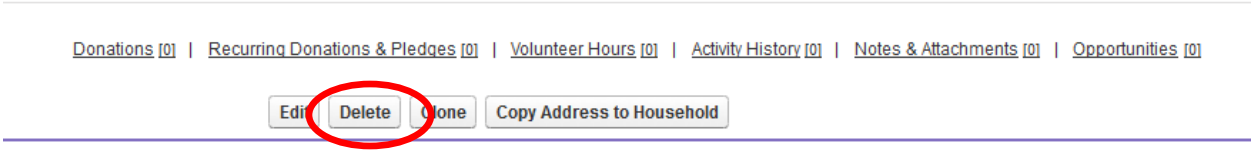
After searching for the contact by name, click on the contact's name. Next, click on the "Edit" button.


Donations [0] | Recurring Donations & Pledges [0] | Volunteer Hours [0] | Activity History [0] | Notes & Attachments [0] | Opportunities [0]
Edit
Delete
Clone
Copy Address to Household

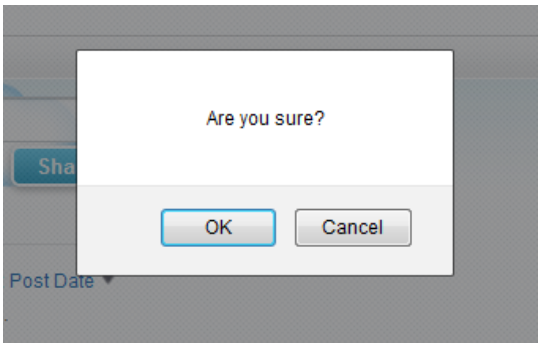
This will allow you to change the contact's details. After editing the contact details, click on the "Save" button.

Deleting Contacts

In order to delete a contact navigate to the contact's page in one of the two ways described in Editing Contacts above. Next, click on the "Delete" button.

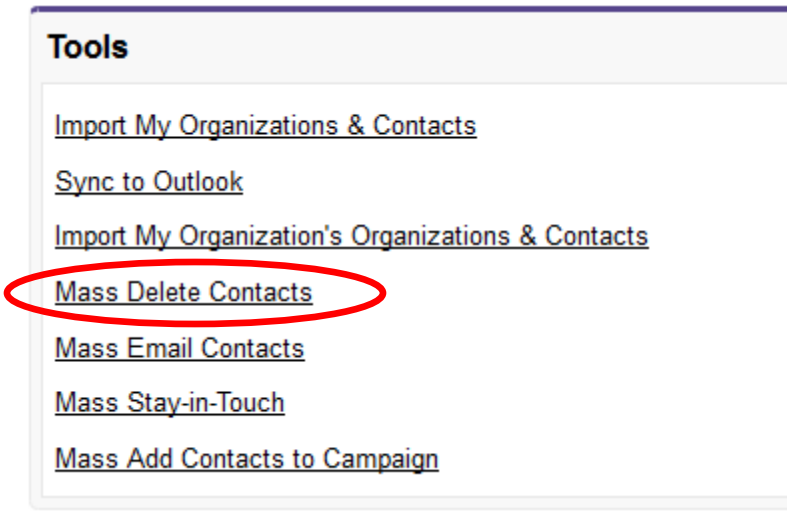

Donations [0] | Recurring Donations & Pledges [0] | Volunteer Hours [0] | Activity History [0] | Notes & Attachments [0] | Opportunities [0]
Edit
Delete
Clone
Copy Address to Household

Click “OK”.

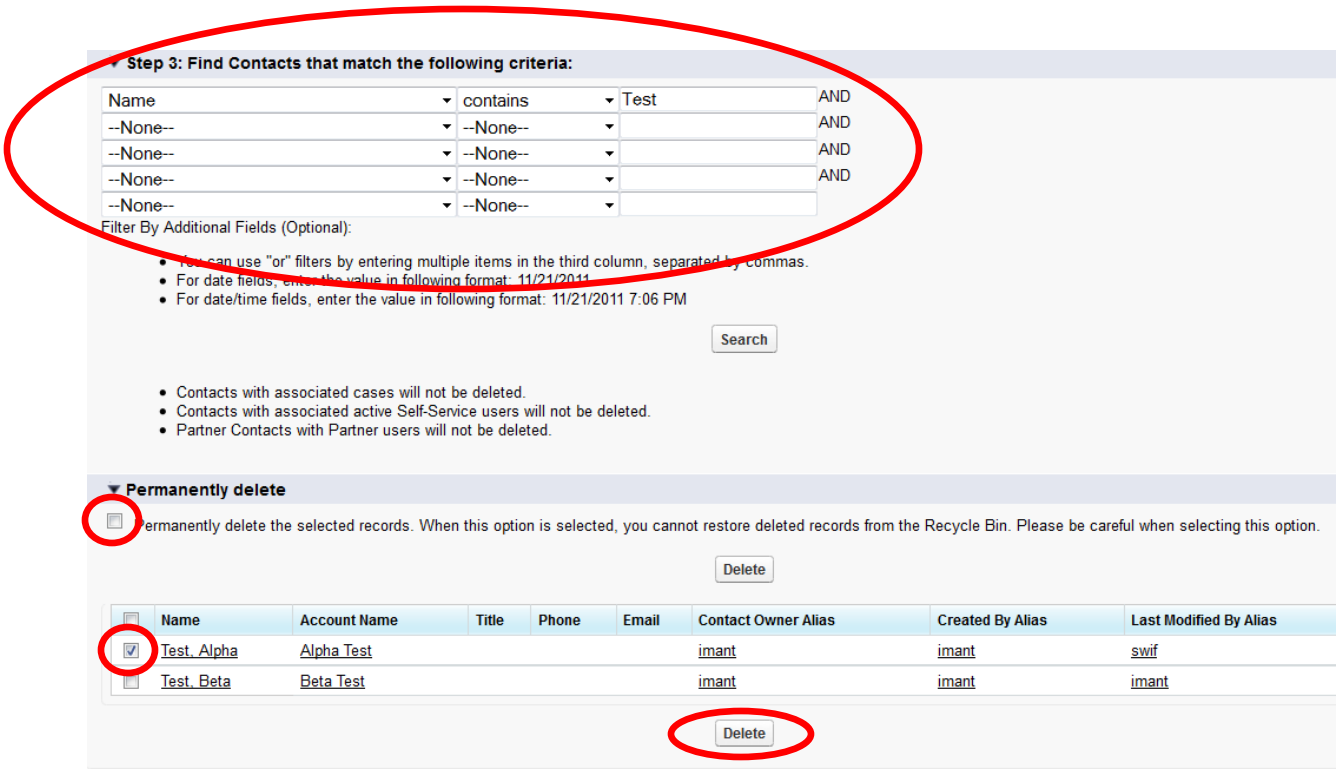


Mass Deleting Contacts

There is also an option to mass delete contacts rather than deleting them one at a time. Note that deleting contacts will also delete any donations, activities, or notes associated with that contact. To do this navigate to the contacts page and click on “Mass Delete Contacts”.

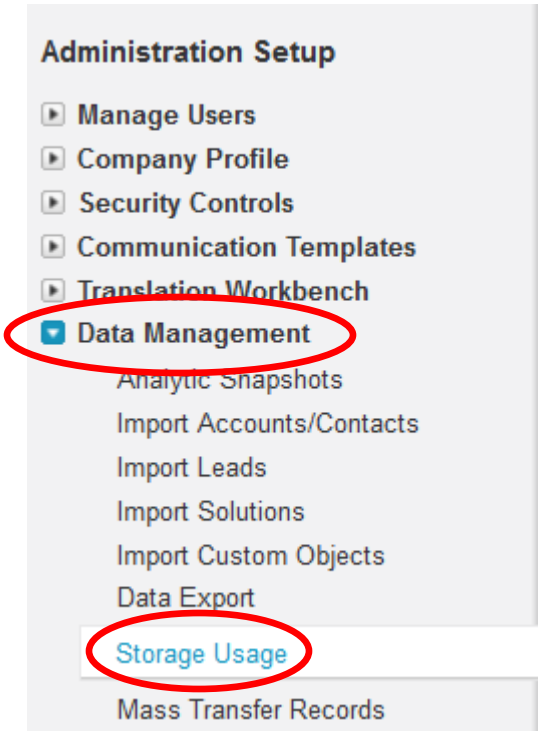


From this screen you can search for contacts to mass delete. In order to delete a contact, slect the check box next to the contact name and then click on the “Delete” button. This will move the contact to the Recycle Bin. If instead you want to permanently delete the contact, then click on the checkbox under “Permanently delet”.

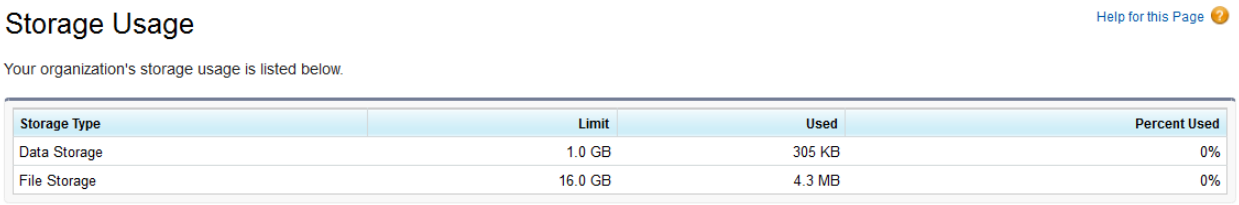


Checking Storage Usage

With nonprofit donation version of Salesforce there is a storage limit of 1GB of data storage and 16GB for file storage. In order to check how much of this storage capacity is currently used navigate to the "Setup" menu. Then select "Data Management" and "Storage Usage".



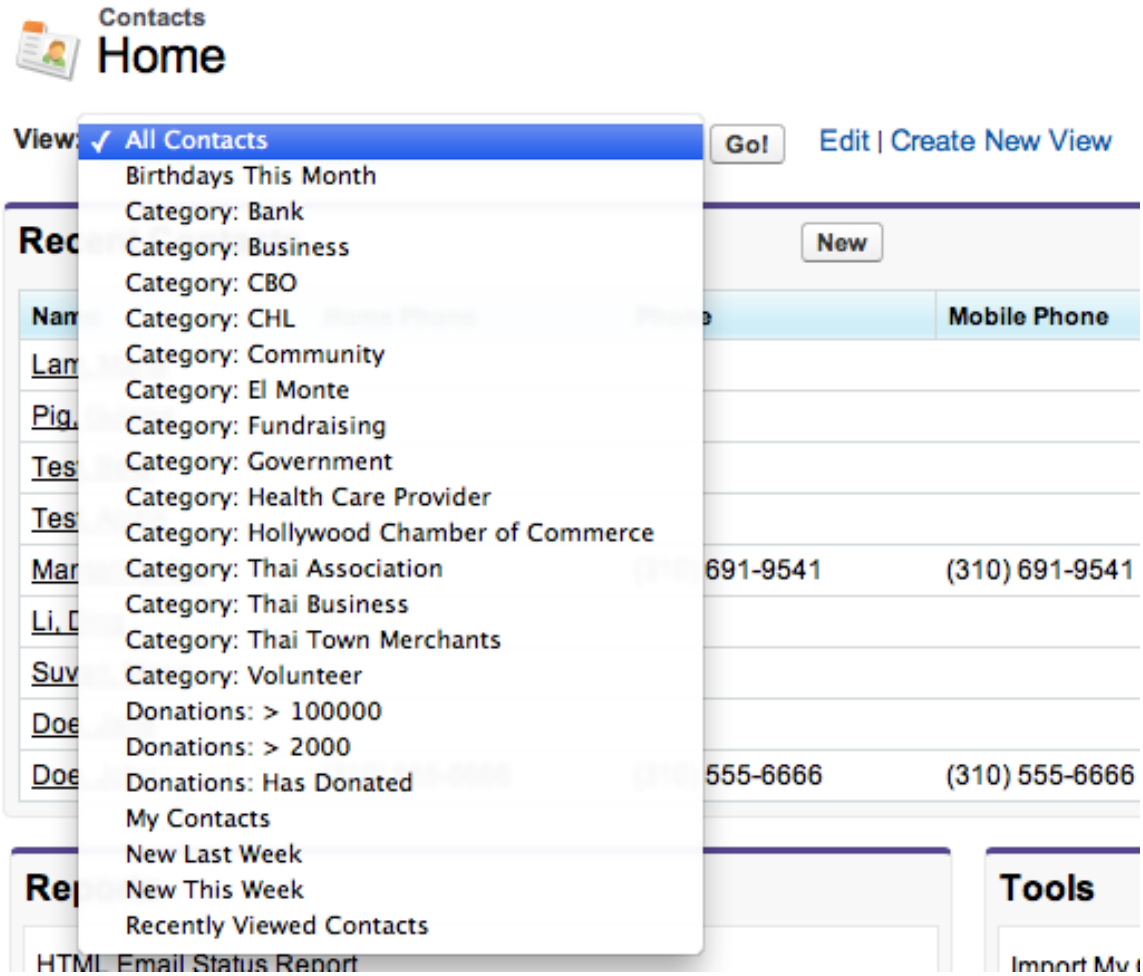
This will take you to a screen that displays how much storage capacity is currently being used.



Filtering Contacts

To filter contacts, Salesforce makes use of *Views.* A View is basically a selection of whatever records you want to work on, based on specified criteria. There are many ways to filter contacts (or any other record type you may want to filter). You can select an existing view, edit a view, or create a totally new view.

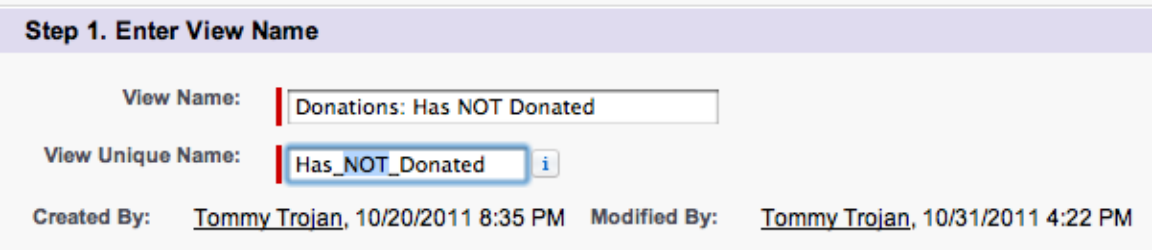
To select an existing view, pick a View from the dropdown list next to “View:” in the Contacts tab.



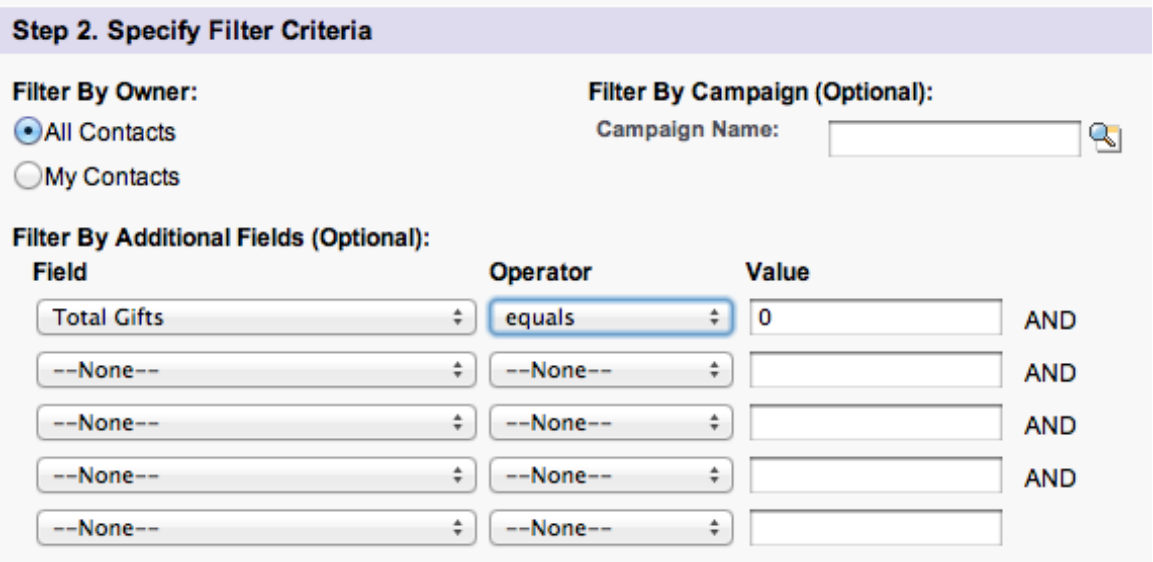
If the view you currently want to use has already been preselected, just click “Go!”

To edit a view, select any view then click the “Edit” link beside the “Go!” button.

If you plan to save the view as a new view, edit the “View Name” and the “View Unique Name” fields.

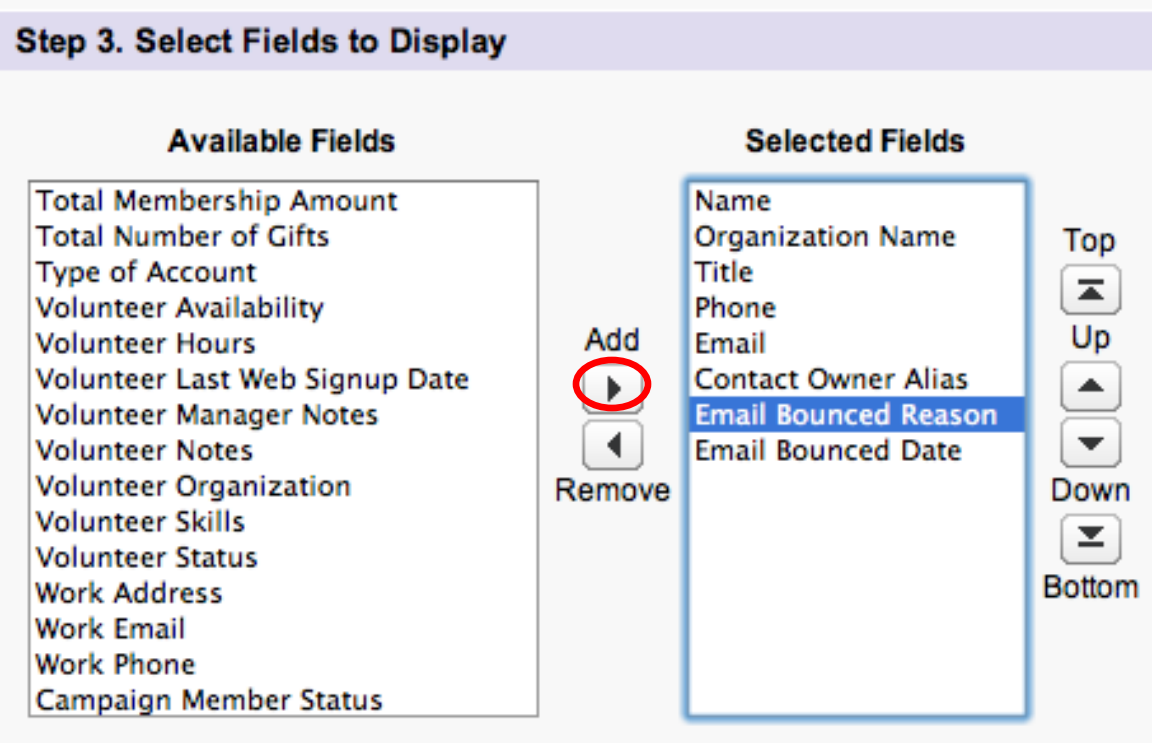


Under the "Specify Filter Criteria" tab, you may select the corresponding fields you want to filter. Select a view operator and a value to use the operator with.



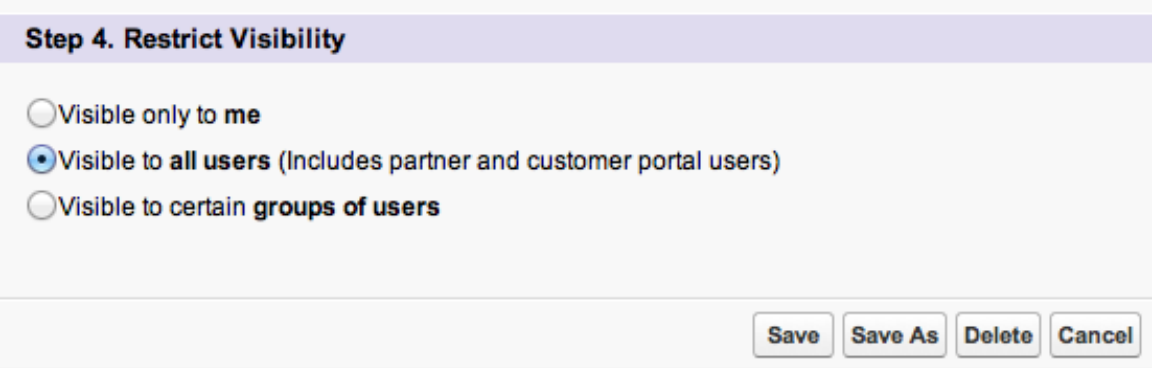
In the example above, making the operator "equals" means I'll be viewing all contacts that haven't made a donation.

Next, select the fields you want to be displayed in the View list. This is especially important if you want to print the list or if you want to select a contact based on certain fields. Select a field from "Available Fields" and click the arrow below "Add" to add a field to the display.



In this example, I added the "Email Bounced Reason" and "Email Bounced Date" to see if the contact hasn't been receiving Emails.

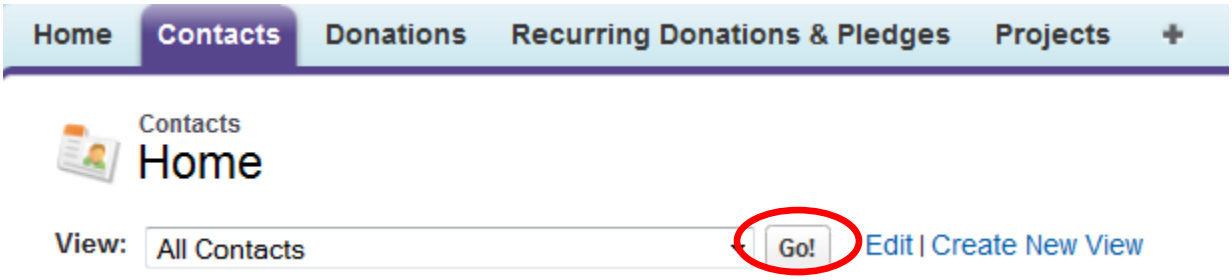
After selecting the Fields you want to display, you can choose who can use the View under "Restrict Visibility"



You may then save the View if you just want to edit the parameters of the existing View by clicking Save, or save the View as a new View by clicking the Save As button next to Save.

Printing Contact Views

In order to print a view of contacts, select the view you want to print and click "Go!".



In the upper right hand corner click the printer icon.

Next, click on "Print this page".

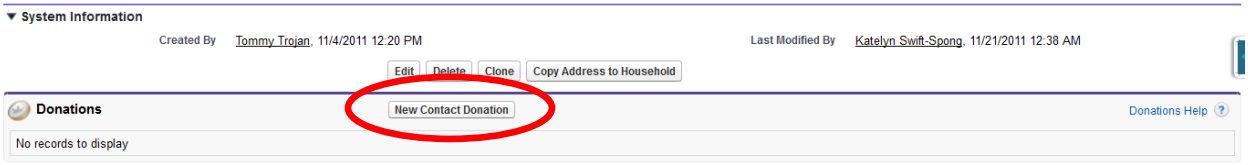
Donations

Adding Donations

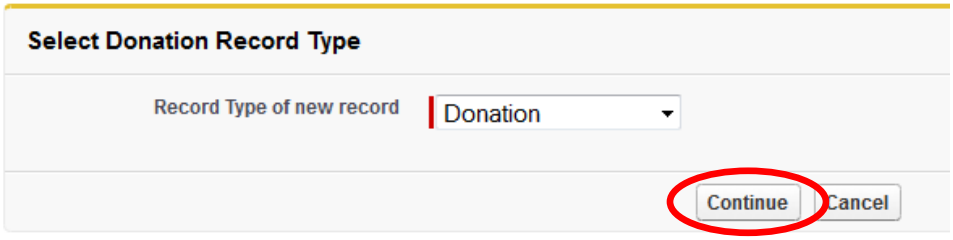
The best way to add donations is by selecting the contact that the donation is from and adding the donation to that contact. This is the ideal way to add a donation to a contact because it will automatically associate the donation with that contact. If donations are added via the "Donation" tab, then it is more difficult to associate that donation with the contact.

Begin by navigating to the contact's page in one of the two ways described in the Editing Contacts section above.

Once on the contact page scroll down to the "Donations" section and click on the "New Contact Donation" button.



Select the appropriate donation type and click “Continue”.

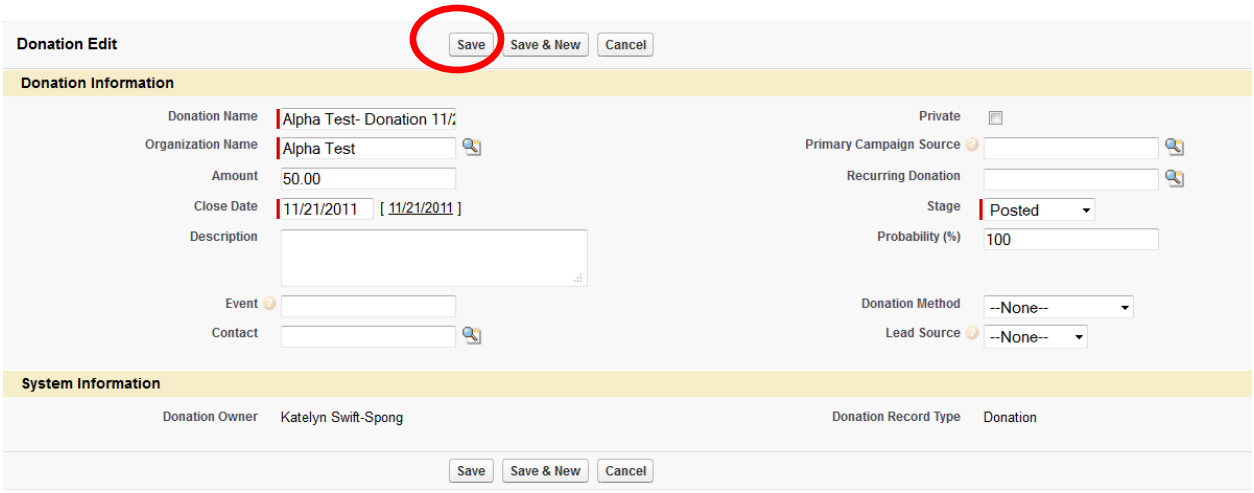


Available Donation Record Types

Record Type Name	Description
Donation	Donation Received
Grant	Grant Received
Major Gift	Large Donation from a Major Donor
Matching Donation	Matching Donation from an Donor's Employer or other Organization
Membership	A membership record type

Fill in the correct information for the donation. Note, a donation name will automatically be generated that consistes of the name of the contact and the donation date. The contact’s organization will also automatically be associated with the donation. This means that the donation will appear on the contact’s page as well as the organization’s page in the future. Also note that the “Lead Source” field refers to how the donor found out about Thai CDC. The “Contact” field does not need to be filled out as the donation is alreay associated with a contact.

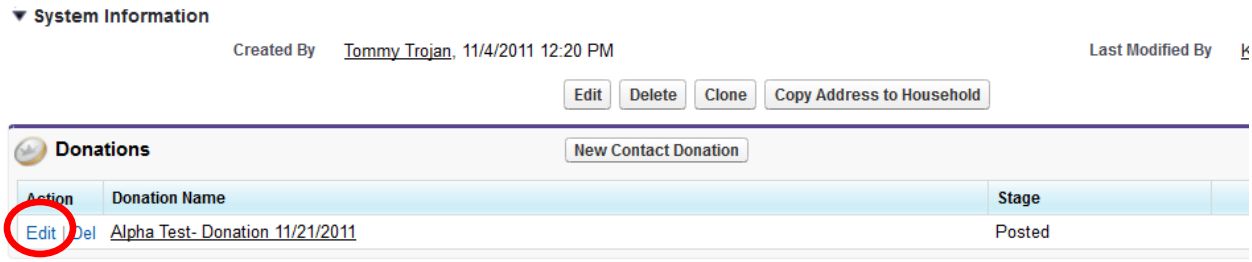
Once the donation information has been entered, click the “Save” button.



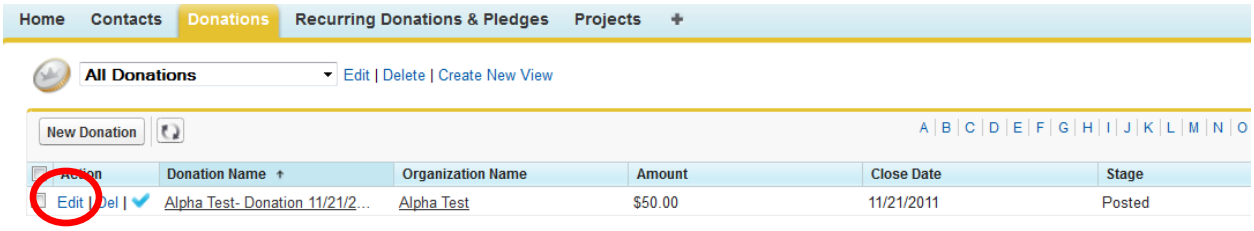
Editing Donations

In order to edit a donation you need to navigate to that donation. This can be done in two ways.

1. Navigate to the contact associated with the donation. Scroll down to the "Donation" section and click on "Edit" next to the donation you want to edit.



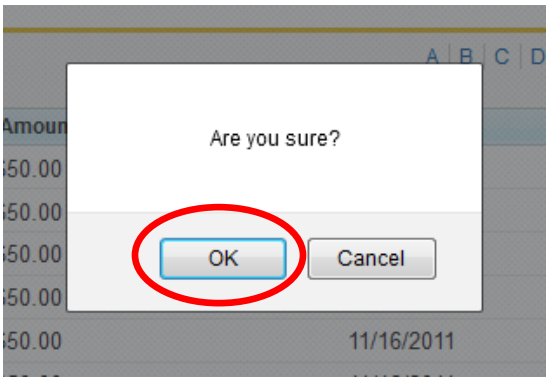
2. Click on the "Donations" tab and use the Views to find the donation you want to edit. Then click the "Edit" text next to that donation.



Finally edit the donation and click on the "Save" button to save your changes."

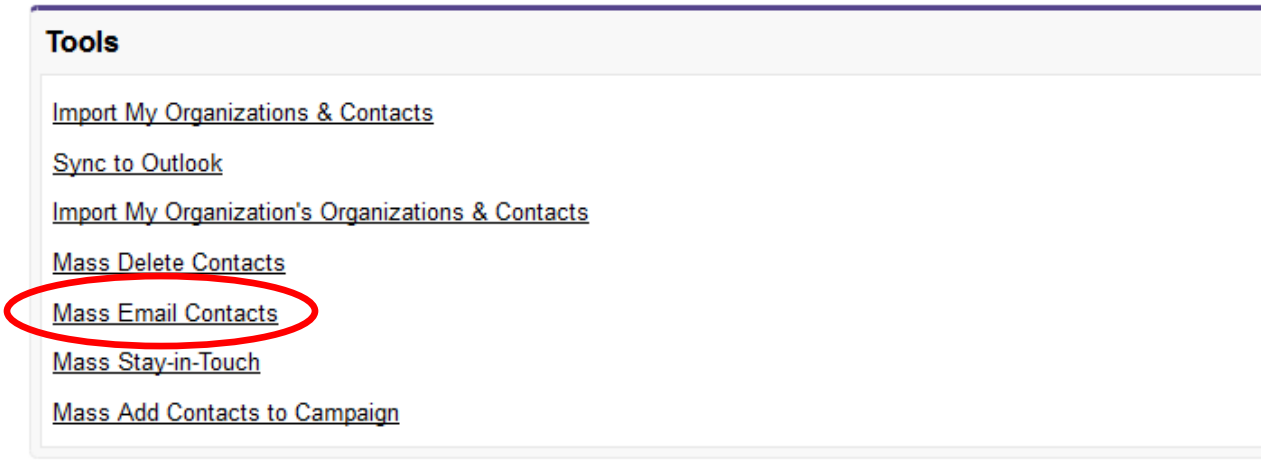
Deleting Donations

Deleting donations can be done by navigating to the donation with either of the two ways described in Editing Donations above. Next, click on the "Del" text next to the donation you want to delete. Then click "OK".

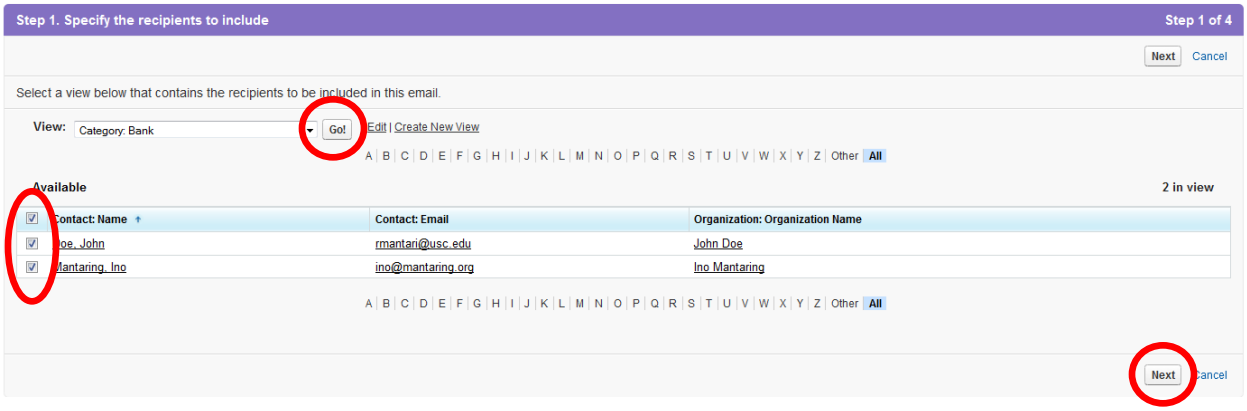


Sending Mass Emails

In order to send a mass email, first navigate to the “Contacts” tab. Then under the “Tools” section click on the link “Mass Email Contacts”.

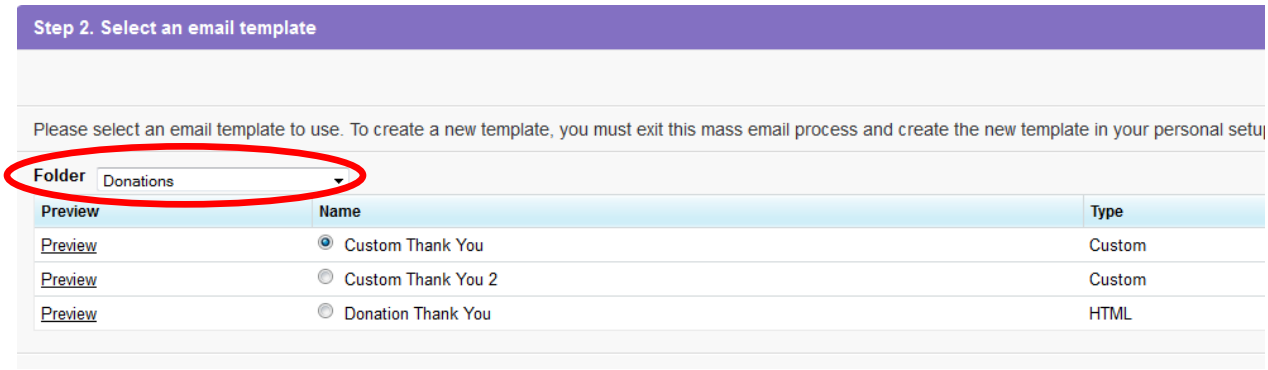


Select a View that contains all the contacts you want to mass email and click the “Go!” button. Note, this step requires that you have already created a View that contains all the contacts you want to email. See Filter Contacts above for how to create a View.

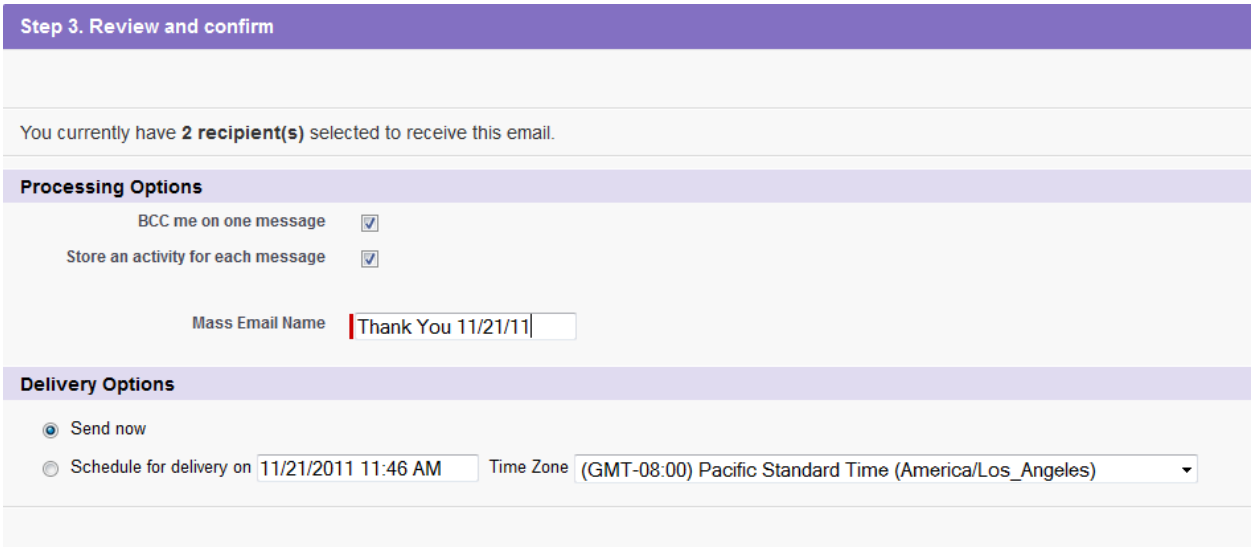

Step 1. Specify the recipients to include
Step 1 of 4
Next
Cancel
Select a view below that contains the recipients to be included in this email.
View:
Category: Bank
Go!
Edit | Create New View
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All
Available
2 in view
Contact: Name
Contact: Email
Organization: Organization Name
Doe, John
rmantari@usc.edu
John Doe
Mantaring, Ino
ino@mantaring.org
Ino Mantaring
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All
Next
Cancel

You can also select or deselect contacts to email individually via the checkboxes on the left side of each name. Once you have all the contacts you want to email selected click the "Next" button on the bottom right.

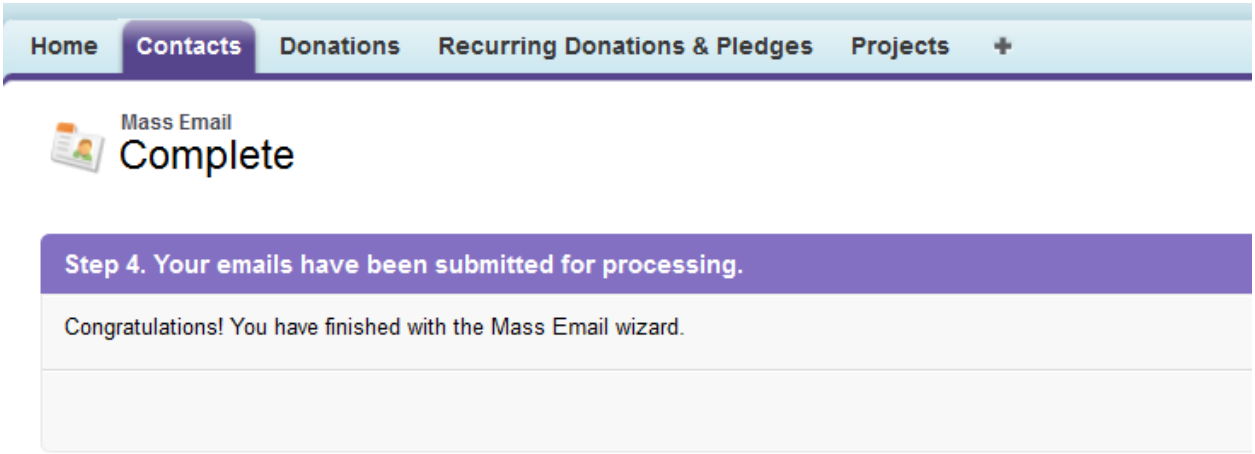
On the following page, select the folder that contains the mass email template you want to use. Next, select the correct email template. You can preview the email template by clicking on the "Preview" text. Note, this step requires that you already have a proper email template created. To create a new email template see the Creating and Editing Mass Email Templates setion below. Once you have selected the correct template click on the "Next" button.



On the next screen give the Mass email a name. Note, this name is the name the mass email will be stored under in Salesforce, not the subject line of the email. You can select to either send the email now or schedule the delivery for another time. Once you have done this, click the "Send" button to send the mass email.

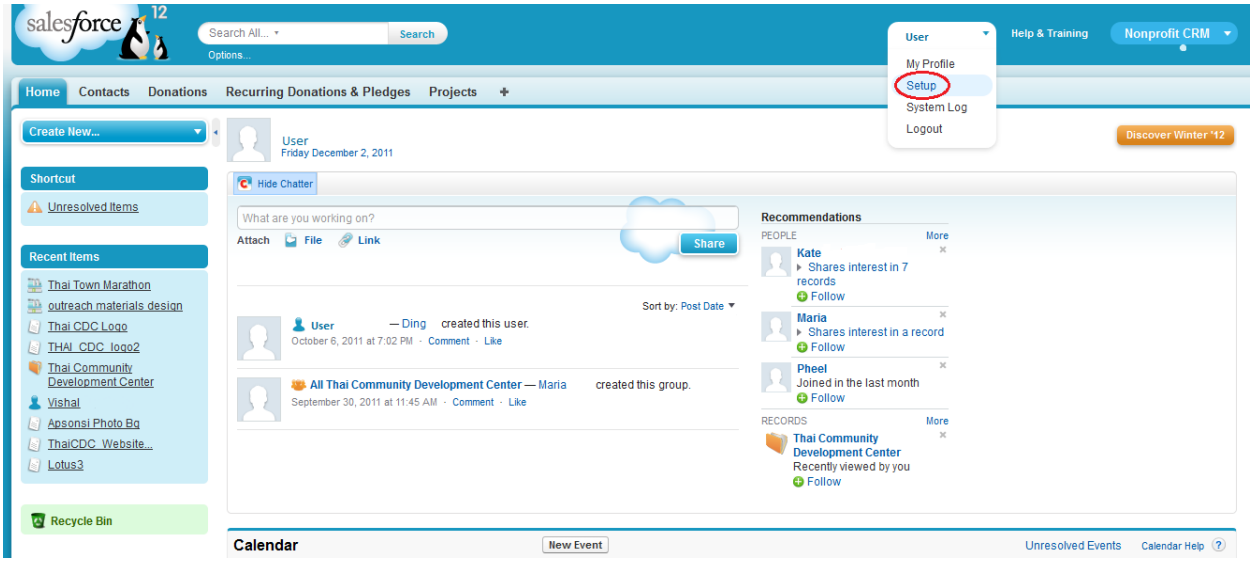

Step 3. Review and confirm
You currently have 2 recipient(s) selected to receive this email.
Processing Options
BCC me on one message
Store an activity for each message
Mass Email Name
Thank You 11/21/11
Delivery Options
Send now
Schedule for delivery on
11/21/2011 11:46 AM
Time Zone
(GMT-08:00) Pacific Standard Time (America/Los_Angeles)

After sending the email, you should see the following screen.

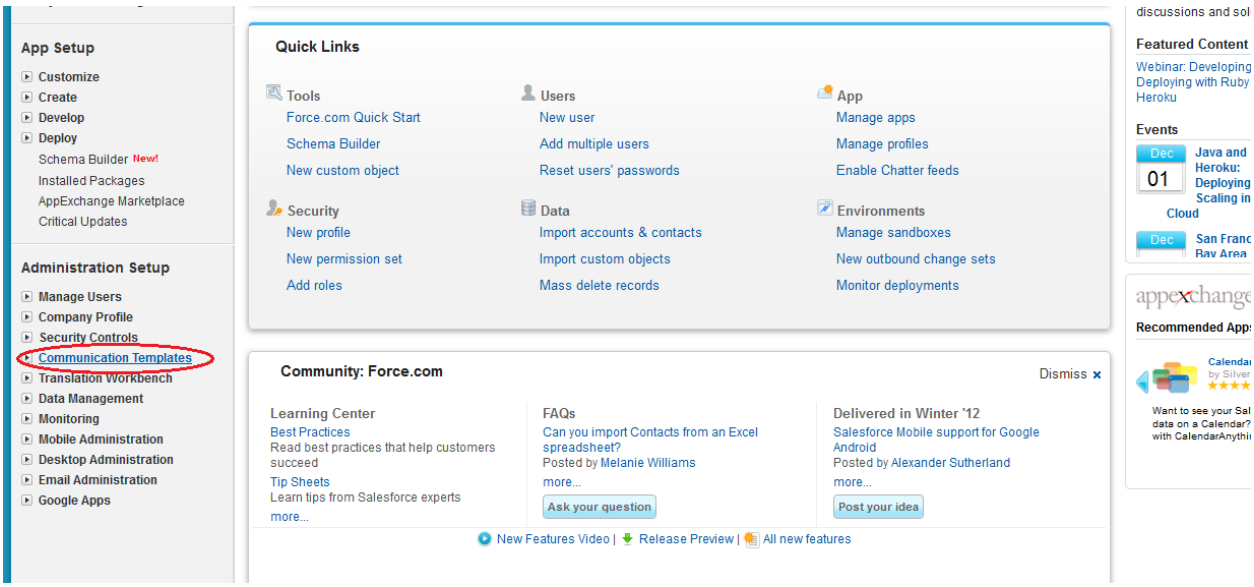


Creating and Editing Mass Email Templates

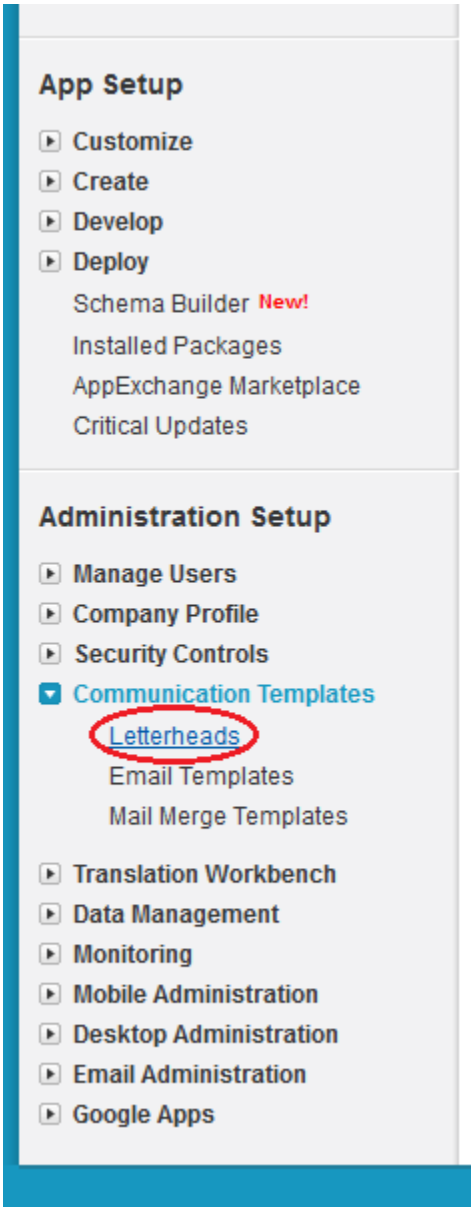
Creating Letterhead



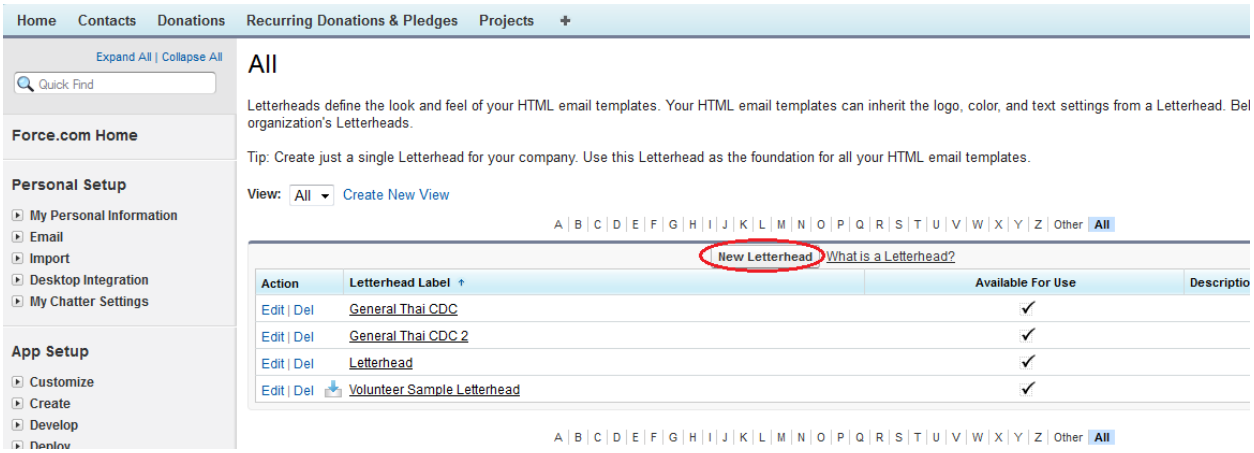
Select “Setup” by clicking your username at the top right of the screen and clicking Setup.



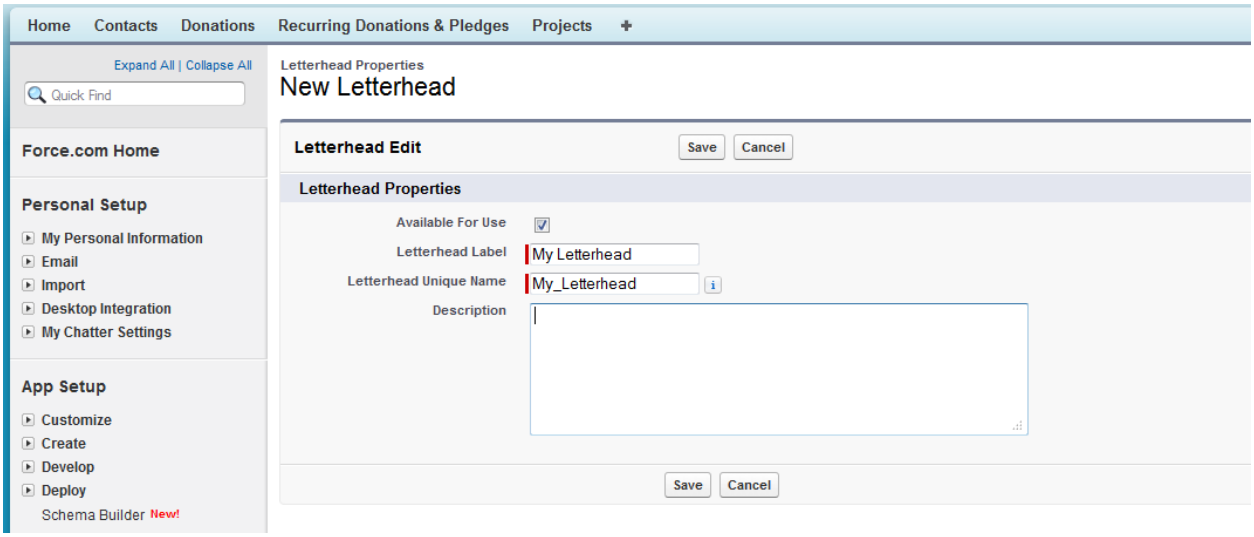
Under Administration Setup in the left hand column select “Communication Templates”.



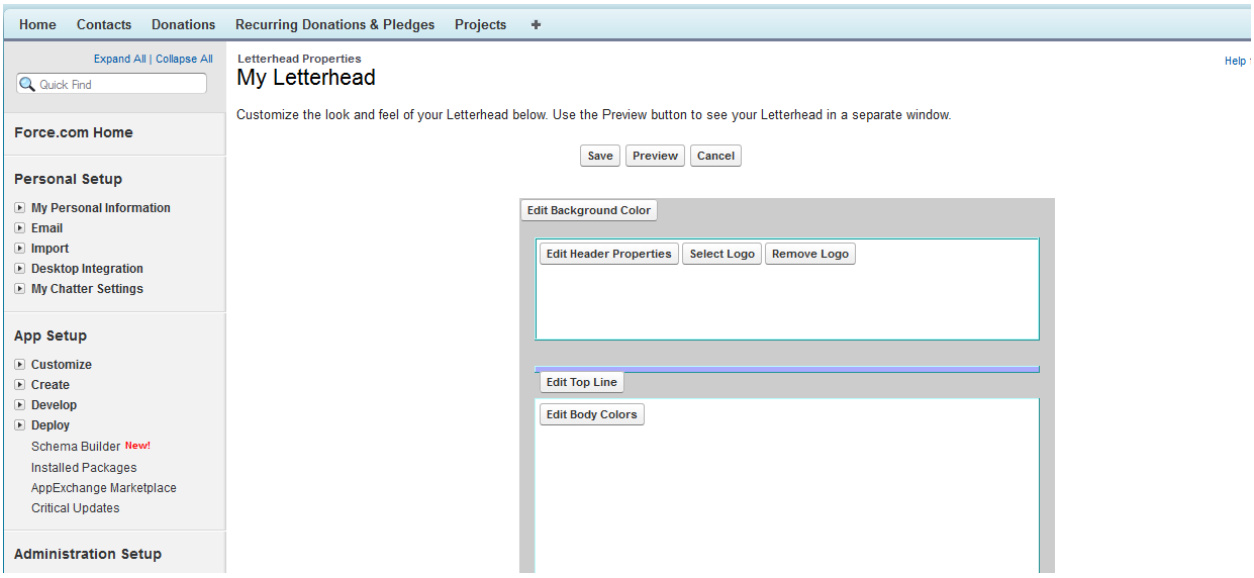
Under Communication Templates select “Letterheads” to bring up the letterheads page.


Home
Contacts
Donations
Recurring Donations & Pledges
Projects
Expand All | Collapse All
Quick Find
Force.com Home
Personal Setup
My Personal Information
Email
Import
Desktop Integration
My Chatter Settings
App Setup
Customize
Create
Develop
All
Letterheads define the look and feel of your HTML email templates. Your HTML email templates can inherit the logo, color, and text settings from a Letterhead. Bel
organization's Letterheads.
Tip: Create just a single Letterhead for your company. Use this Letterhead as the foundation for all your HTML email templates.
View: All
Create New View
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All
New Letterhead
What is a Letterhead?
Action
Letterhead Label
Available For Use
Edit | Del
General Thai CDC
General Thai CDC 2
Letterhead
Volunteer Sample Letterhead

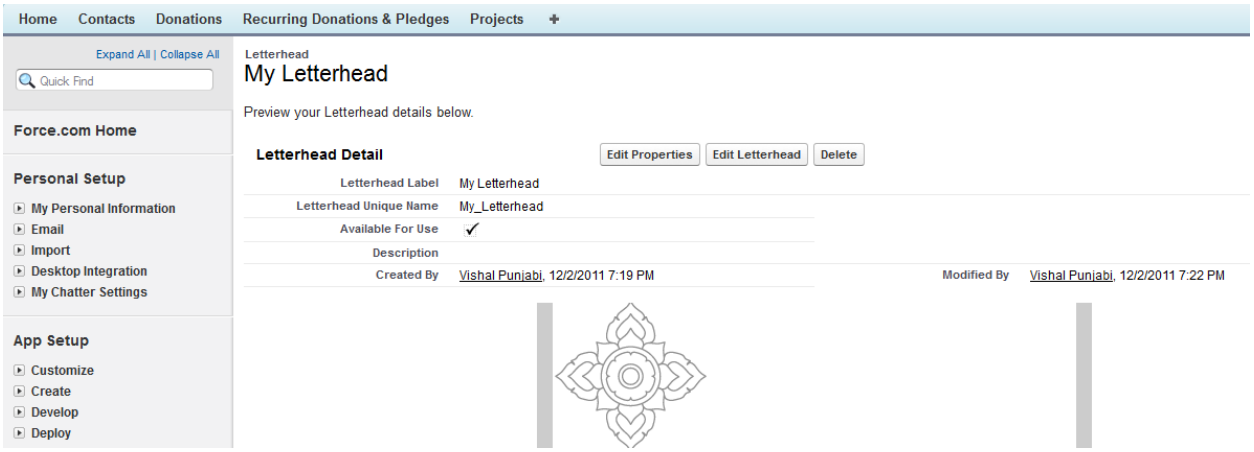
Select “New Letterhead” to create a new letterhead.



Click the check box for “Available For Use” to allow the letterhead to be available for use by others. Then enter a label for the letterhead and press tab to automatically generate a unique letterhead name. Lastly enter a short description for the letterhead and click save to create the letterhead.

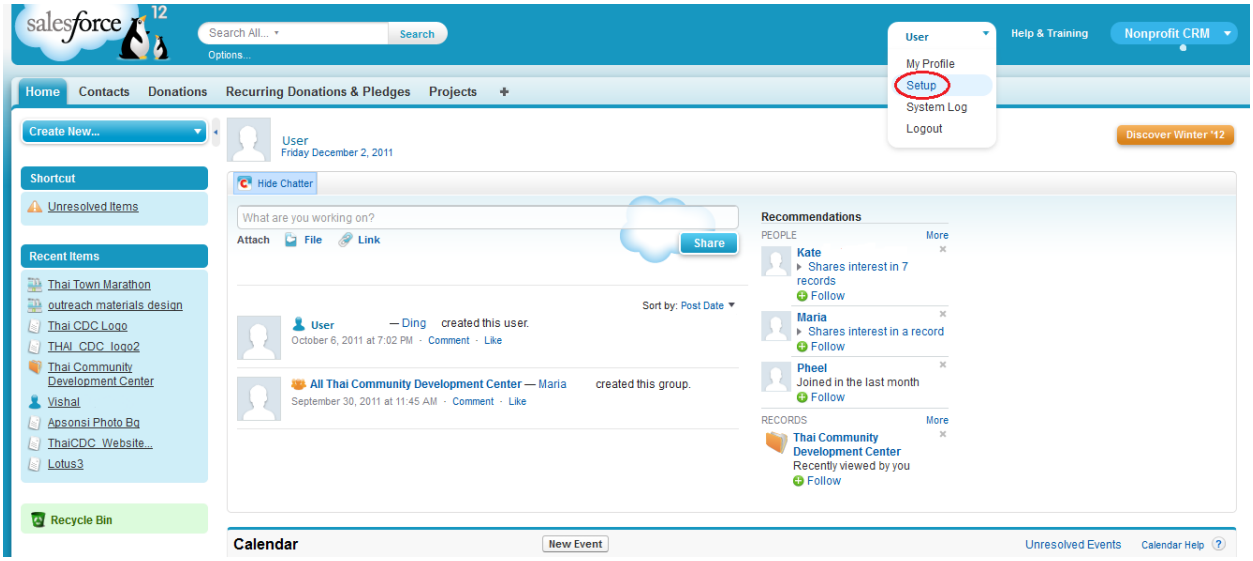


Select the logo or other properties for the letterhead using the buttons provided. After you are done customizing the letterhead click "Save" to save the changes to the letterhead.

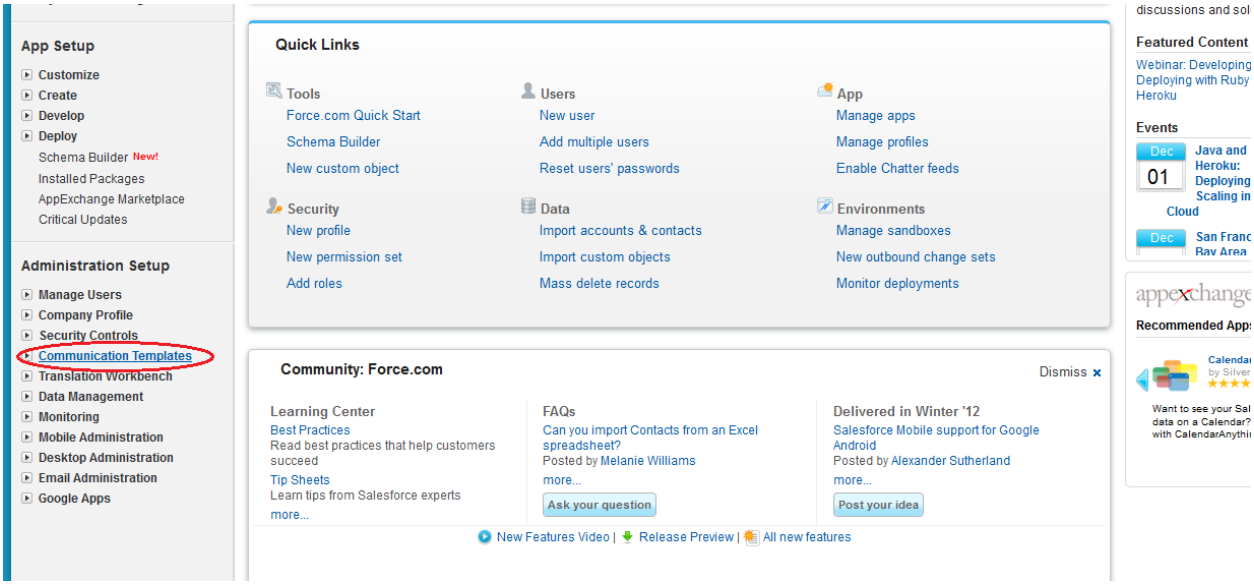


This screen indicates the successful creation and customization.

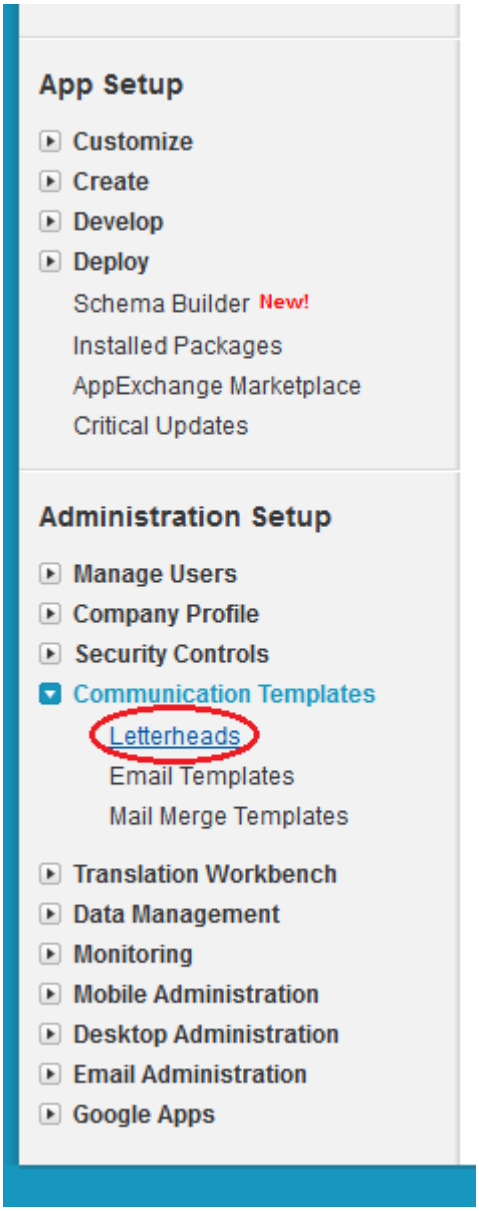
Editing letterhead



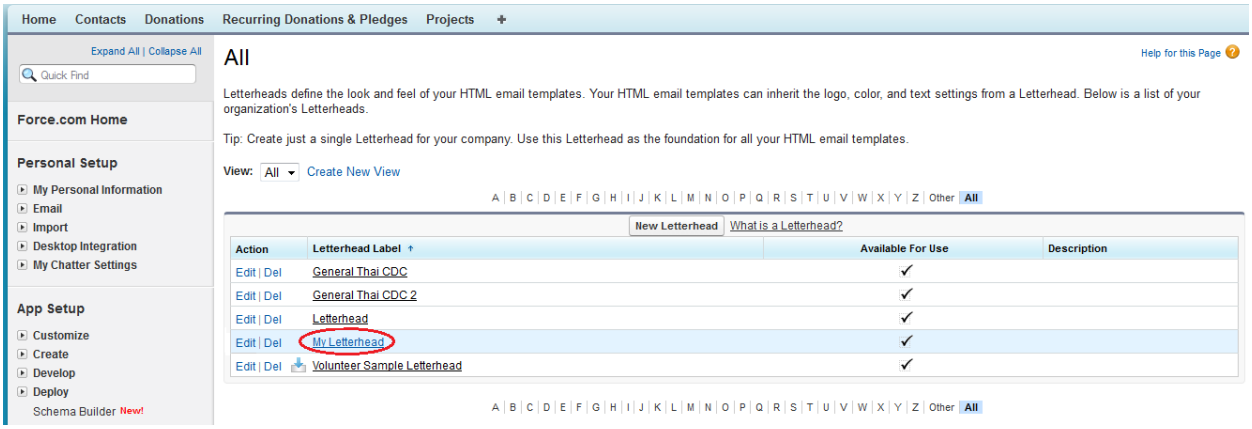
Select “Setup” by clicking your username at the top right of the screen and clicking Setup.



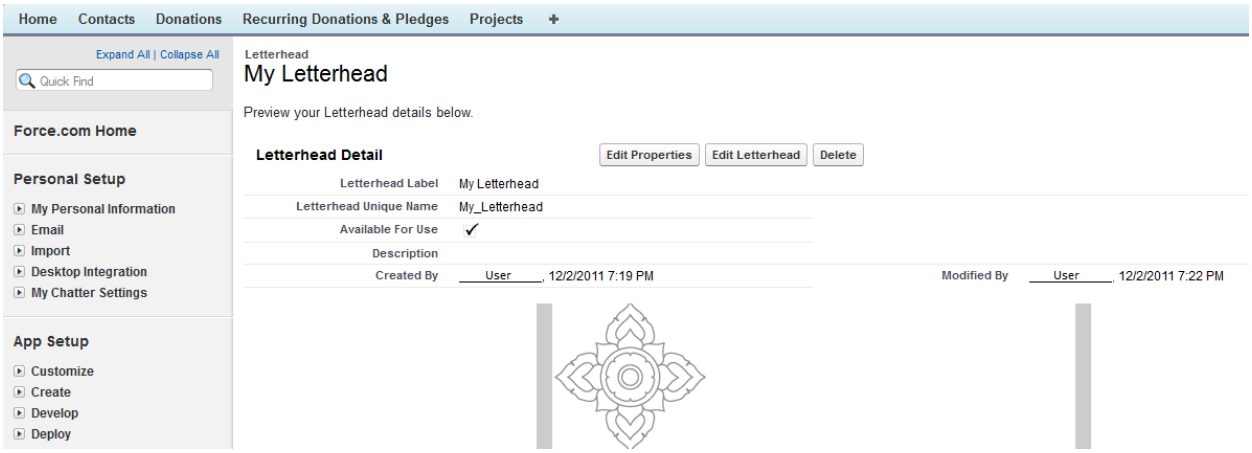
Under Administration Setup in the left hand column select “Communication Templates”.



Under Communication Templates select “Letterheads” to bring up the letterheads page.

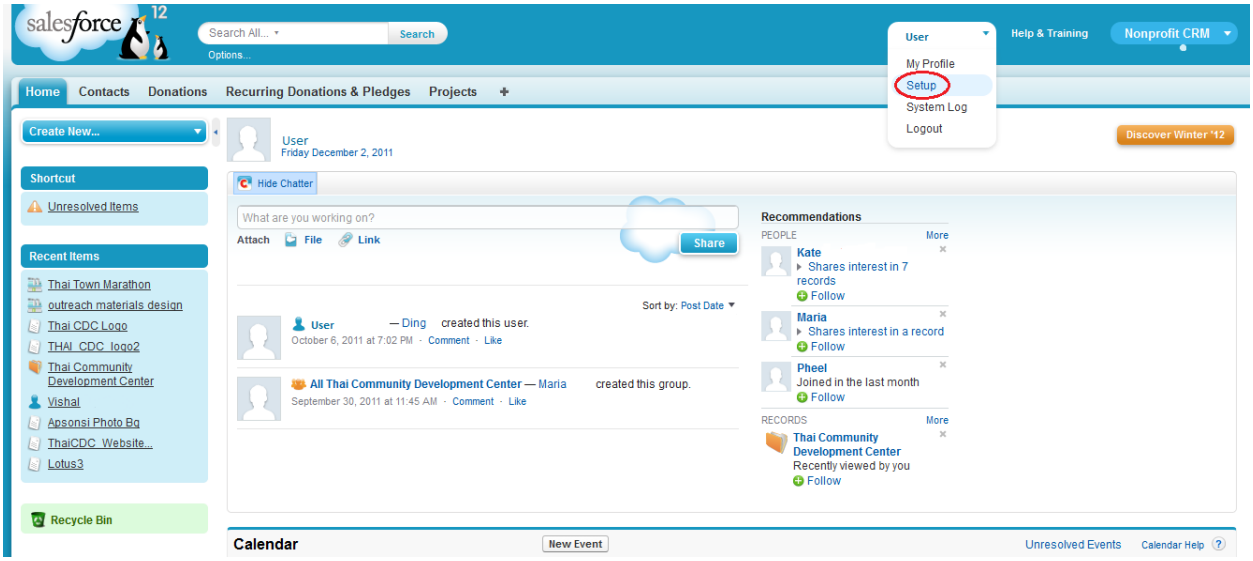

Home
Contacts
Donations
Recurring Donations & Pledges
Projects
Expand All | Collapse All
Quick Find
Force.com Home
Personal Setup
My Personal Information
Email
Import
Desktop Integration
My Chatter Settings
App Setup
Customize
Create
Develop
Deploy
Schema Builder New!
All
Help for this Page
Letterheads define the look and feel of your HTML email templates. Your HTML email templates can inherit the logo, color, and text settings from a Letterhead. Below is a list of your organization's Letterheads.
Tip: Create just a single Letterhead for your company. Use this Letterhead as the foundation for all your HTML email templates.
View: All
Create New View
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All
New Letterhead
What is a Letterhead?
Action
Letterhead Label
Available For Use
Description
Edit | Del
General Thai CDC
General Thai CDC 2
Letterhead
My Letterhead
Volunteer Sample Letterhead

Click on the letterhead that you want to edit.

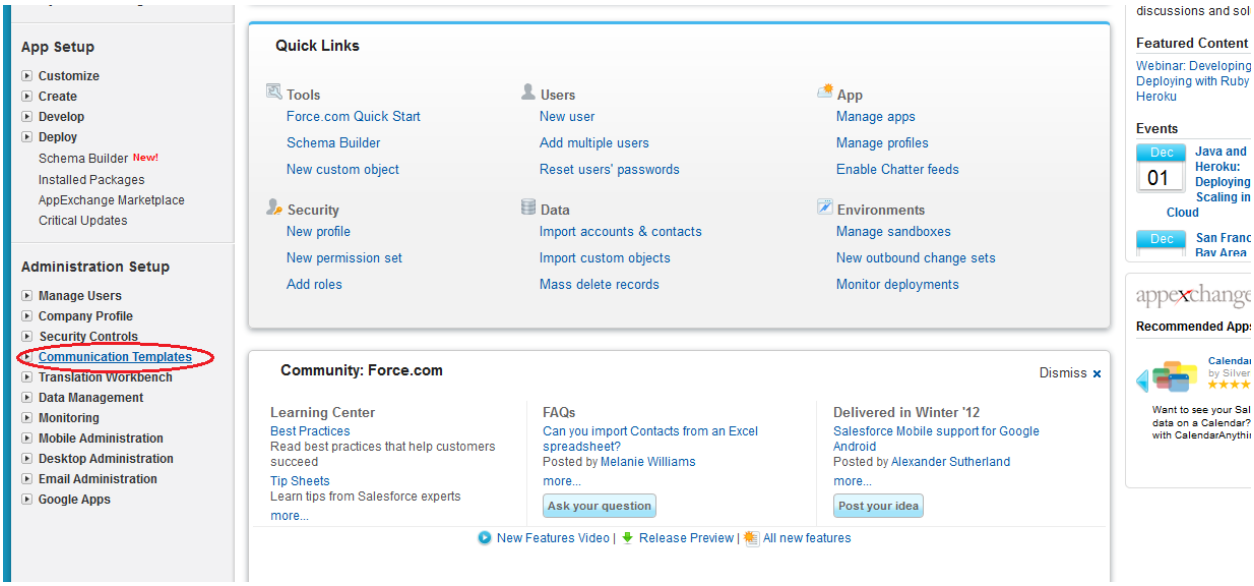


If you want to edit the properties of the letterhead instead of the contents of the letterhead then click on “Edit Properties” button. If you want to edit the contents of the letterhead then click on “Edit Letterhead” button.

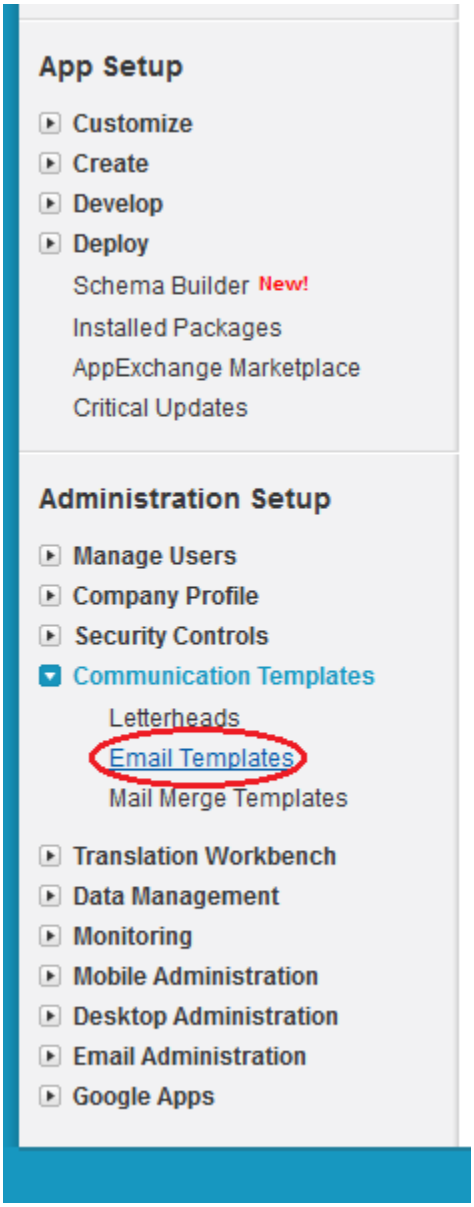
Creating E-mail Template



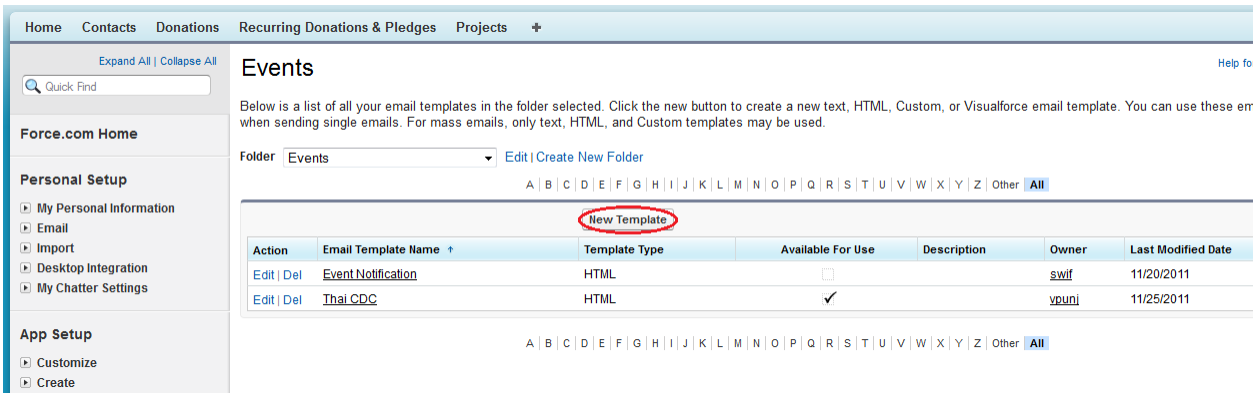
Select “Setup” by clicking your username at the top right of the screen and clicking Setup.



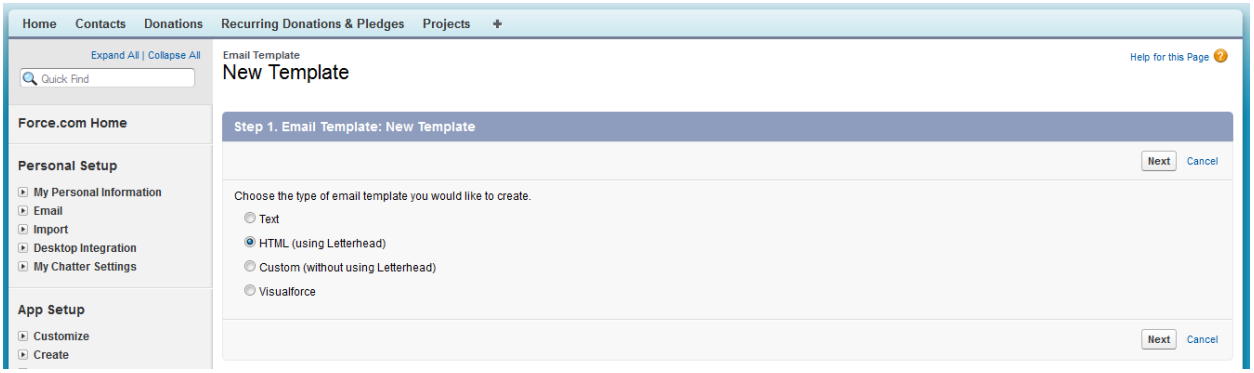
Under Administration Setup in the left hand column select “Communication Templates”.



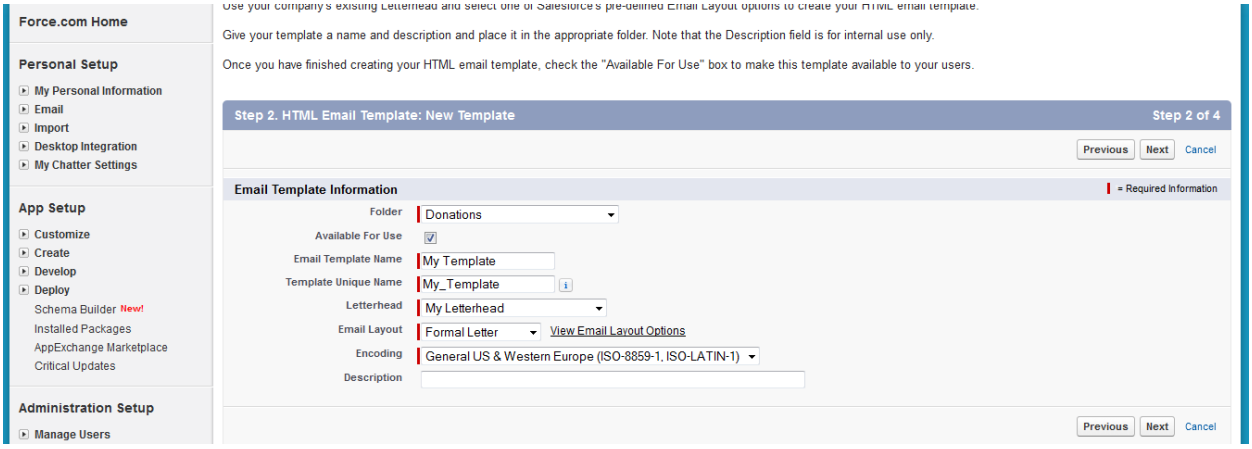
Under Communication Templates select “Email Templates” to bring up the email templates page.


Home
Contacts
Donations
Recurring Donations & Pledges
Projects
Expand All | Collapse All
Quick Find
Force.com Home
Personal Setup
My Personal Information
Email
Import
Desktop Integration
My Chatter Settings
App Setup
Customize
Create
Events
Below is a list of all your email templates in the folder selected. Click the new button to create a new text, HTML, Custom, or Visualforce email template. You can use these em
when sending single emails. For mass emails, only text, HTML, and Custom templates may be used.
Folder
Events
Edit | Create New Folder
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All
New Template
Action
Email Template Name
Template Type
Available For Use
Description
Owner
Last Modified Date
Edit | Del
Event Notification
HTML
swif
11/20/2011
Edit | Del
Thai CDC
HTML
vpunj
11/25/2011

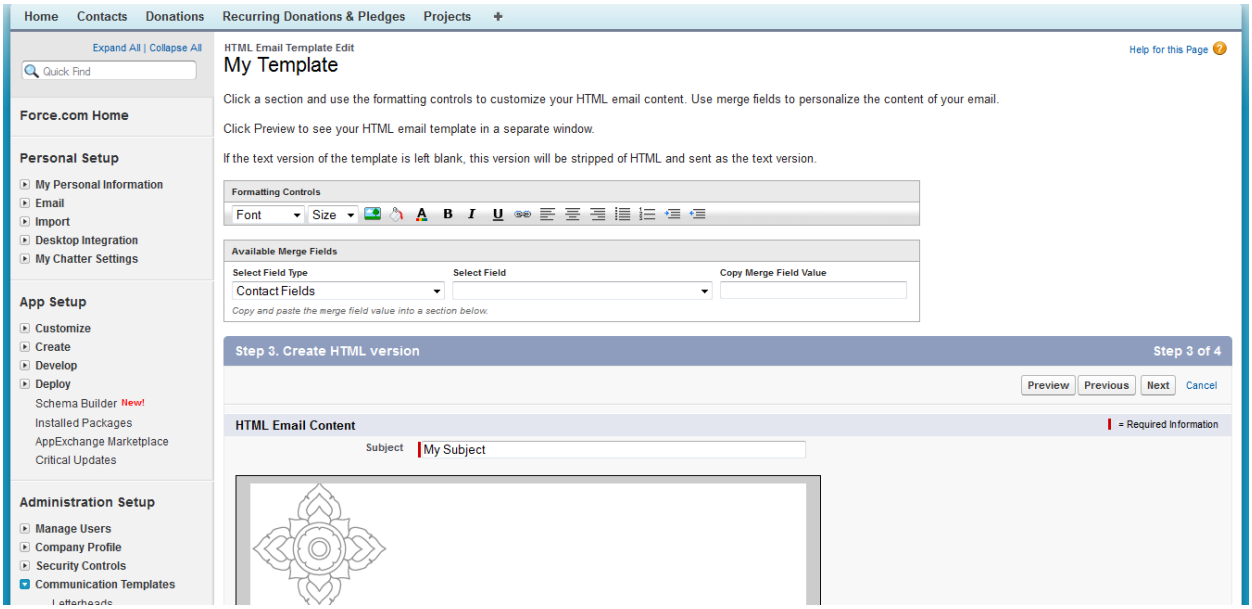
Select “New Template” to create a new template.



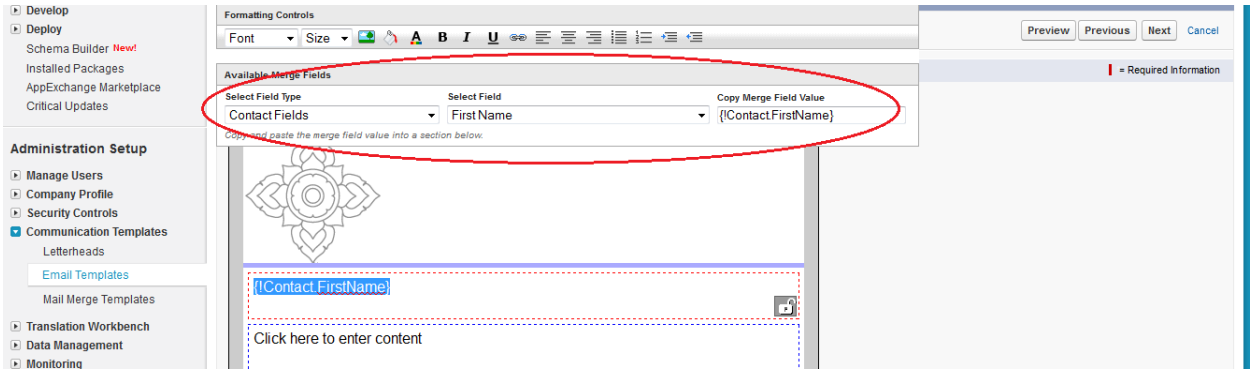
Select the type of template that you want to create. In most cases you will want to create a HTML text. After selecting the template click “Next” button.



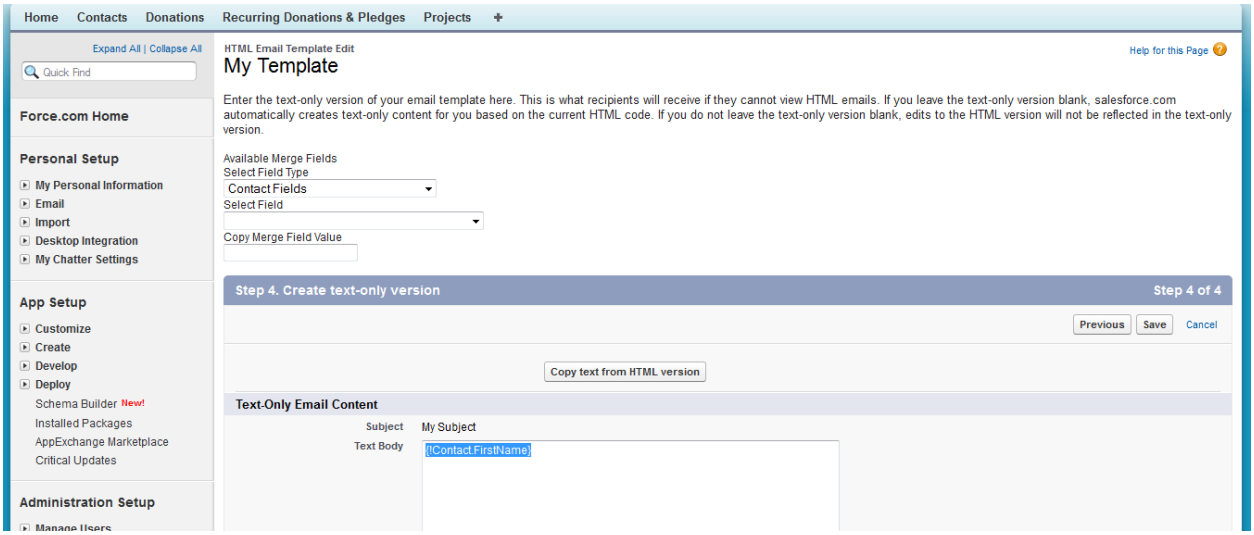
Select the folder that you want to template to exist in. Click the check box for “Available For Use” to allow the template to be available for use by others. Then enter template name and press tab to automatically generate the “Template unique name”. Then pick an email layout type from the Email Layout dropdown list. Lastly enter a short description for the letterhead and click next to proceed to step 3 in creating a template.



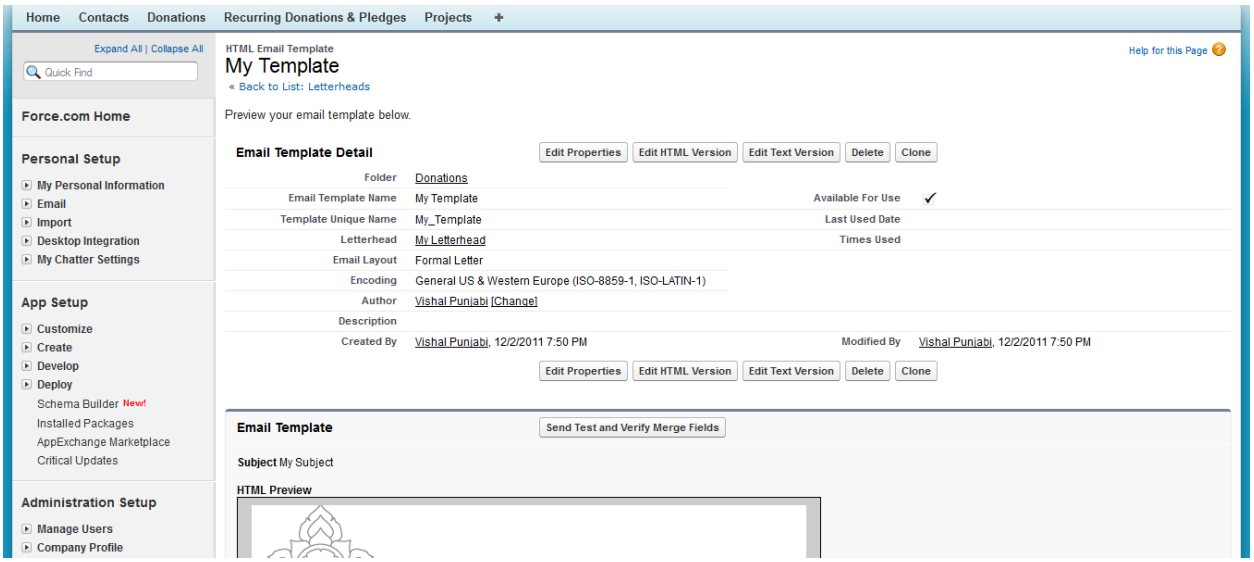
Now you can add content to your template.



Salesforce provides field that you can use to automatically populate your templates. For example to automatically fill in a contact's first name, in the template you should have "{!Contact.FirstName}".

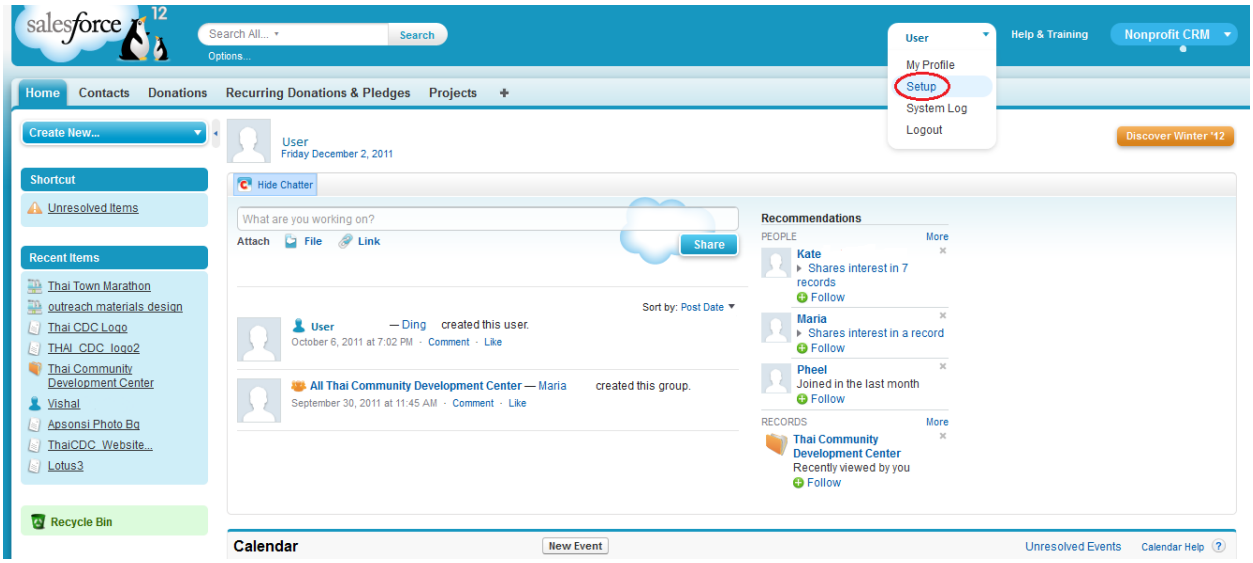


After finishing the html content you are prompted to create the text version. A button at the top "Copy text from HTML version" gives the option of copying text from the html version that you created.

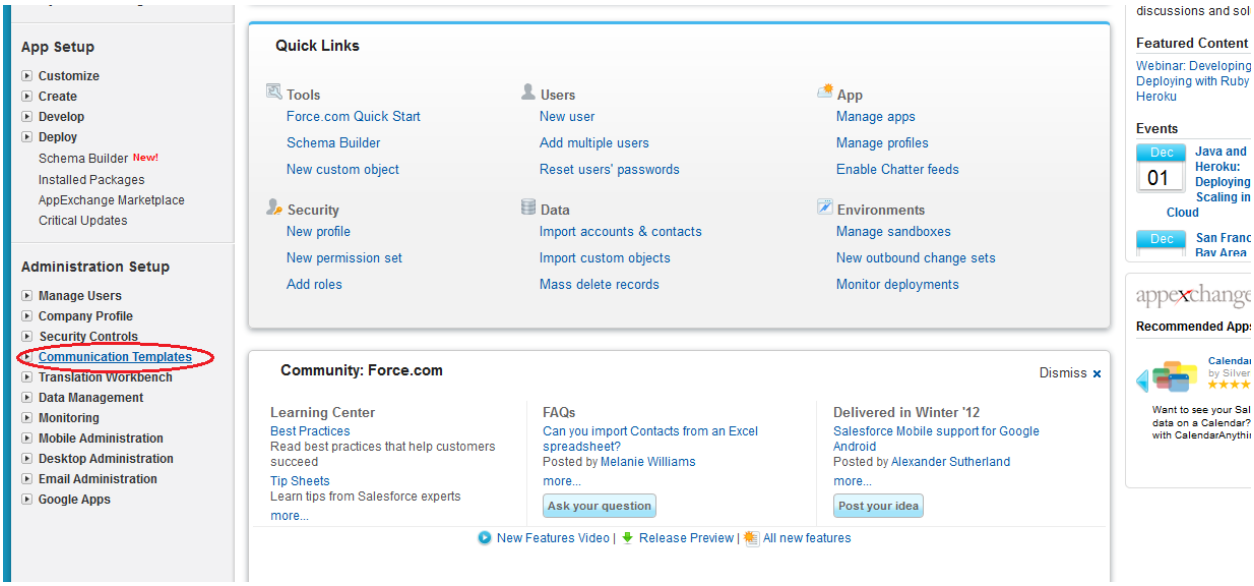


This page will show the successful creation of the template that you created.

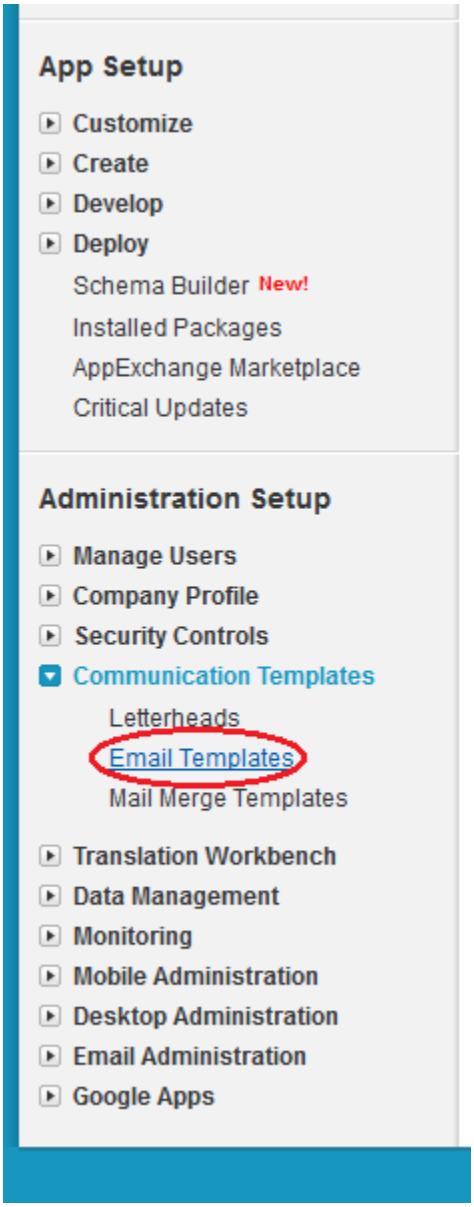
Edit Templates



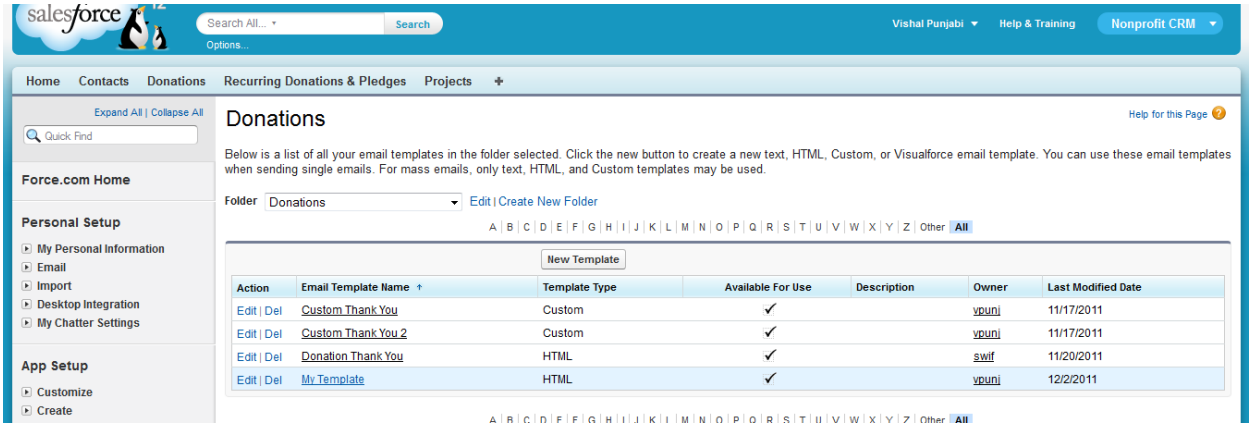
Select “Setup” by clicking your username at the top right of the screen and clicking Setup.



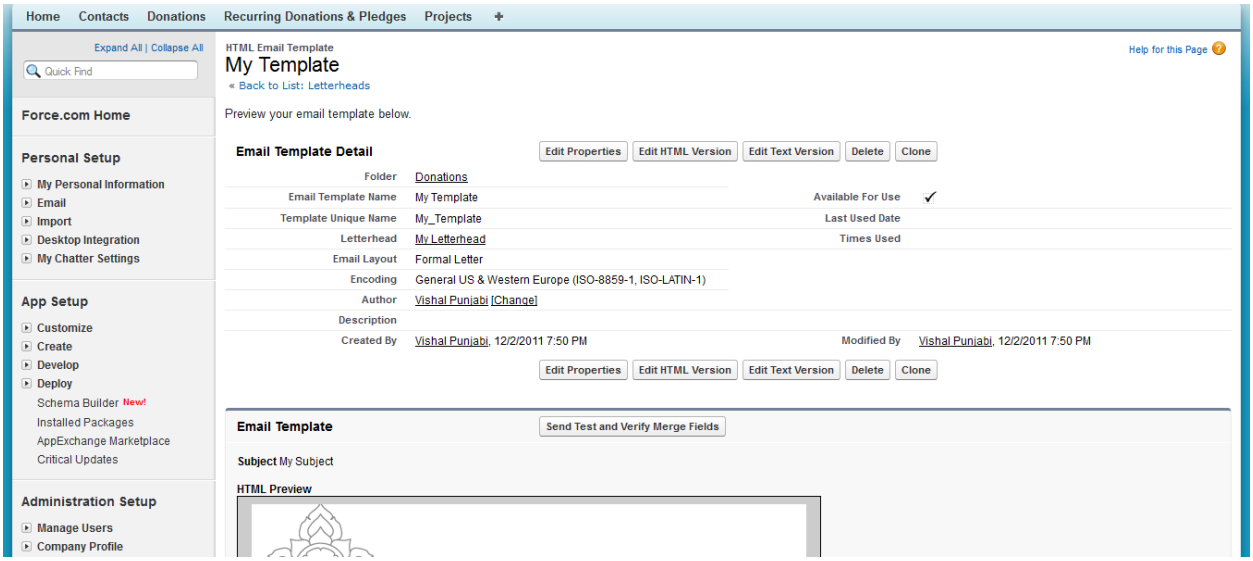
Under Administration Setup in the left hand column select “Communication Templates”.



Under Communication Templates select “Email Templates” to bring up the email templates page.



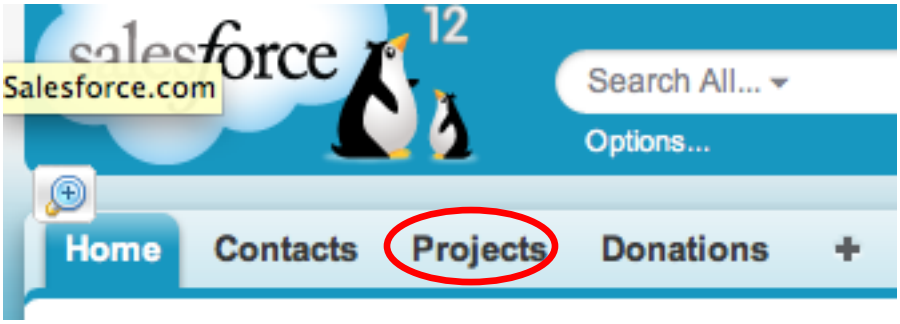
Select the template that you want to edit by clicking of the template name.



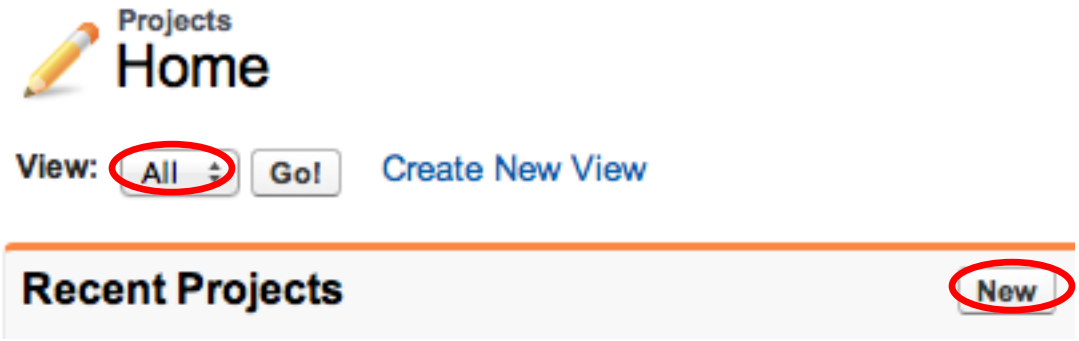
From this screen you can either edit the properties of the template by clicking on the “Email Templates” button or you can edit the contents of the template by clicking on the “Edit HTML Version” button for the html version and “Edit Text Version” button for the text version.

Outcome Tracking

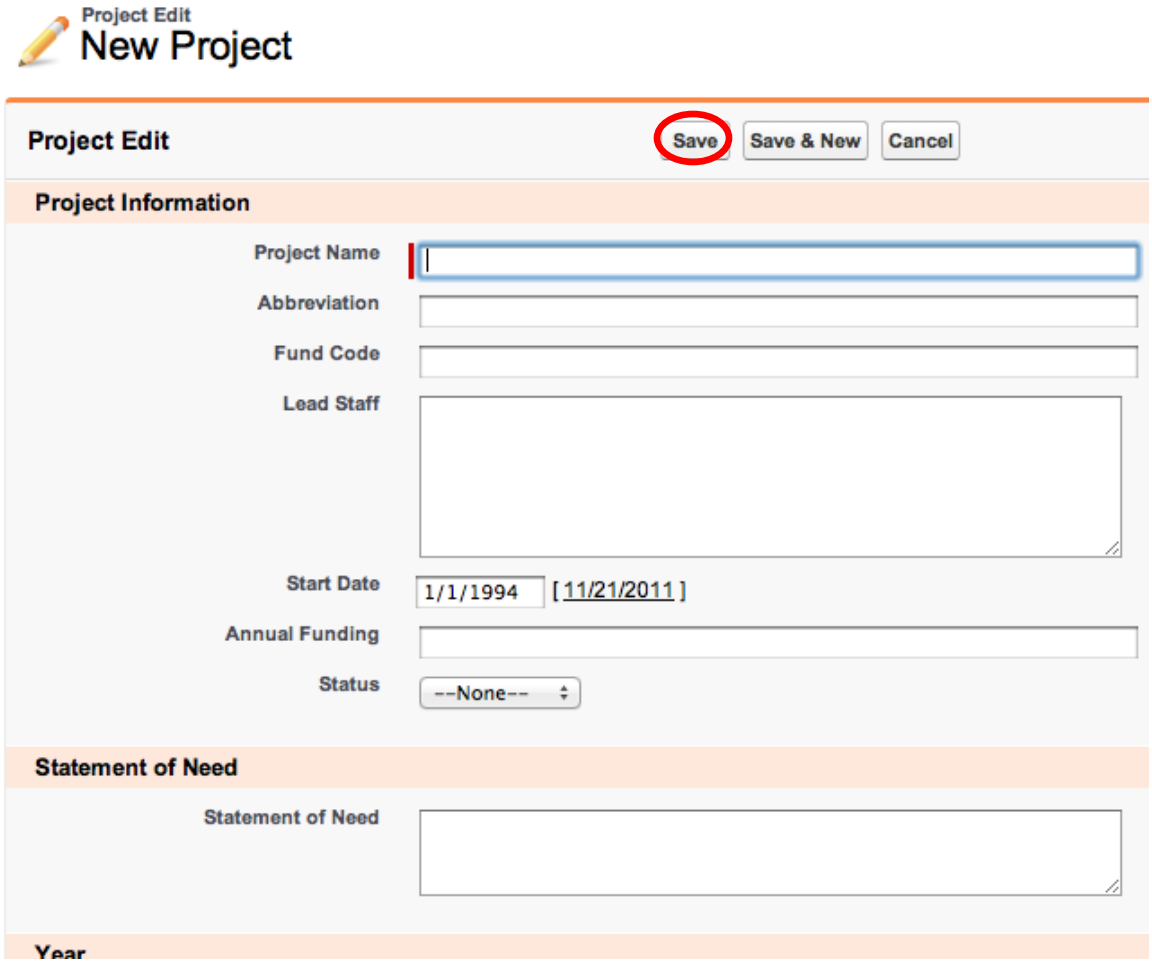
Click the Projects link on the Navigation bar.



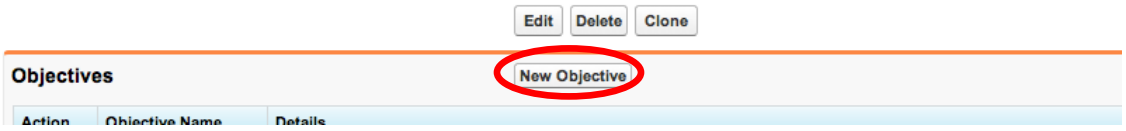
To create a new Project, click “New”. To view projects, select a View.



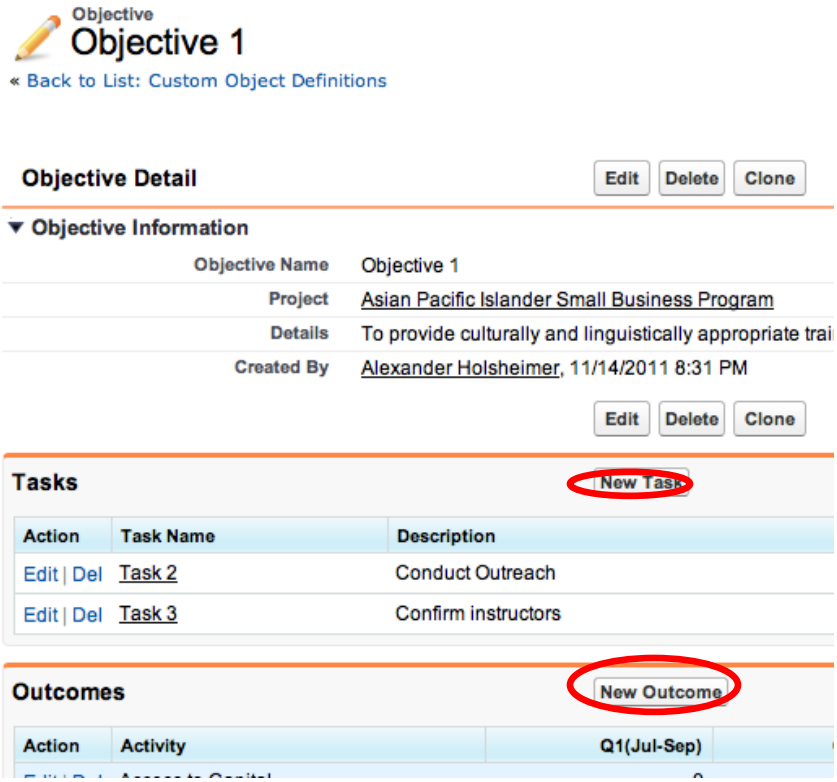
When you click “New”, the general fields for a project will be displayed. Enter the required information and click Save to save the project to the database, or Save & New to save the project and create a new one.

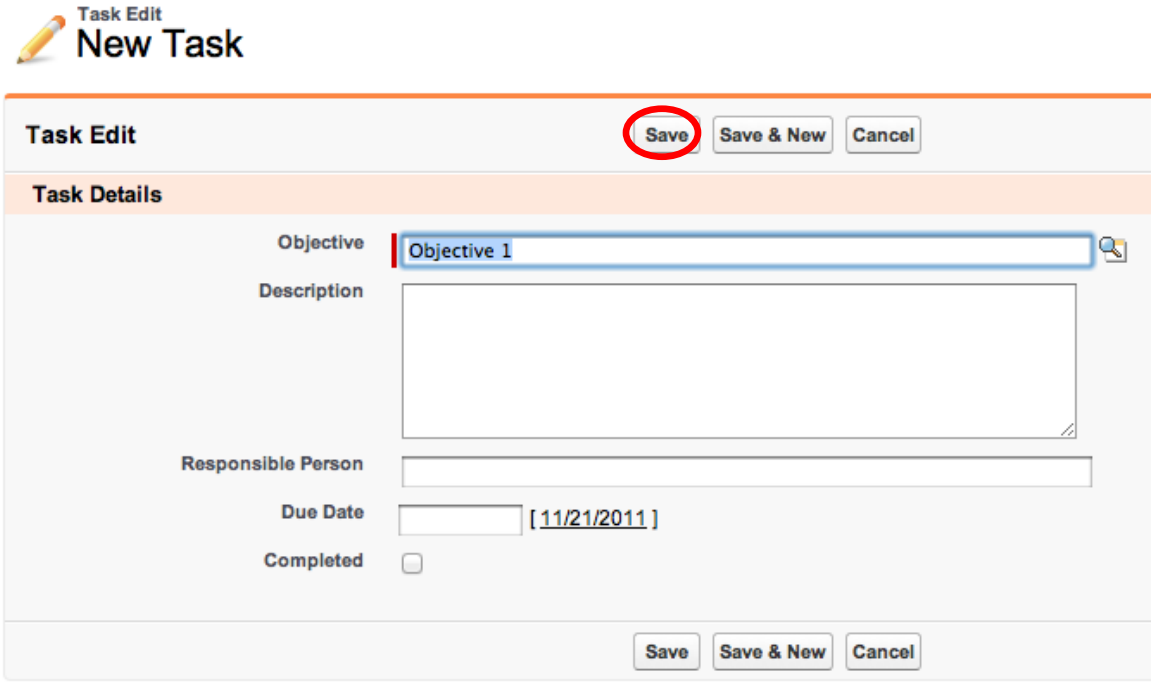


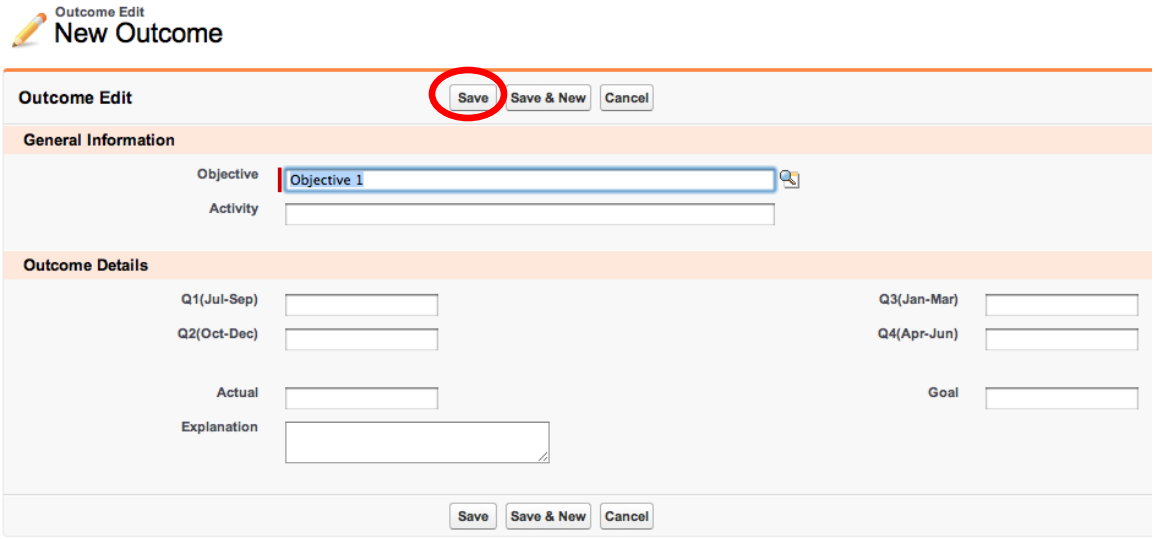
When you view or save a project, you will enter the Project Details Page. From here you will be able to create new Objectives under the Objectives tab. Clicking on “New Objective” will bring you to the Objective Creation Page.



Enter the required information in the Objective Creation Page and click “Save” to save the project objective. From the Objective Page you can create new Tasks and Outcomes by clicking “New” under their respective tabs, similar to how objectives were created for projects.

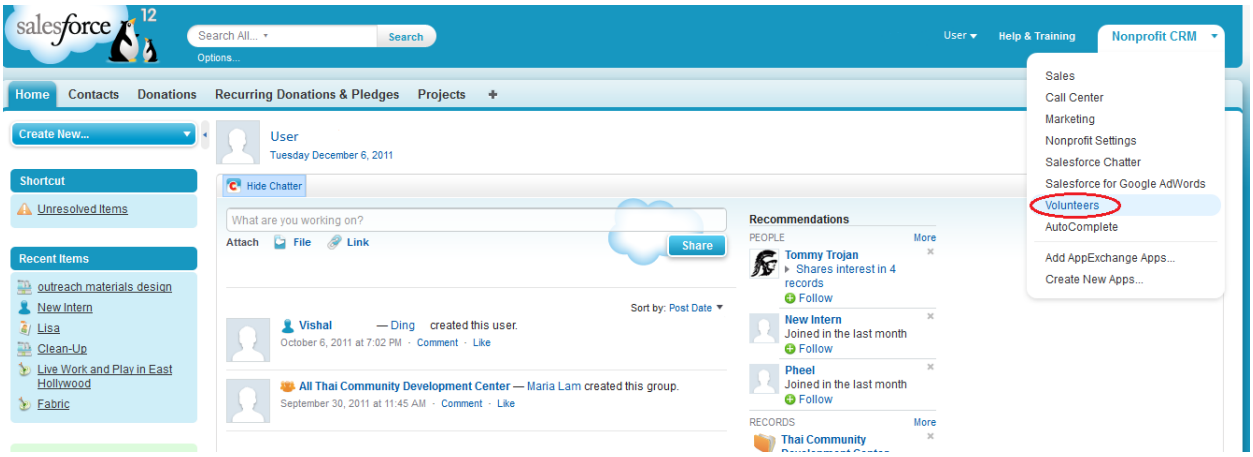

Objective
Objective 1
« Back to List: Custom Object Definitions
Objective Detail
Edit
Delete
Clone
Objective Information
Objective Name
Objective 1
Project
Asian Pacific Islander Small Business Program
Details
To provide culturally and linguistically appropriate trai
Created By
Alexander Holsheimer, 11/14/2011 8:31 PM
Edit
Delete
Clone
Tasks
New Task
Action
Task Name
Description
Edit | Del
Task 2
Conduct Outreach
Edit | Del
Task 3
Confirm instructors
Outcomes
New Outcome
Action
Activity
Q1(Jul-Sep)


Task Edit
New Task
Task Edit
Save
Save & New
Cancel
Task Details
Objective
Objective 1
Description
Responsible Person
Due Date
[11/21/2011]
Completed
Save
Save & New
Cancel

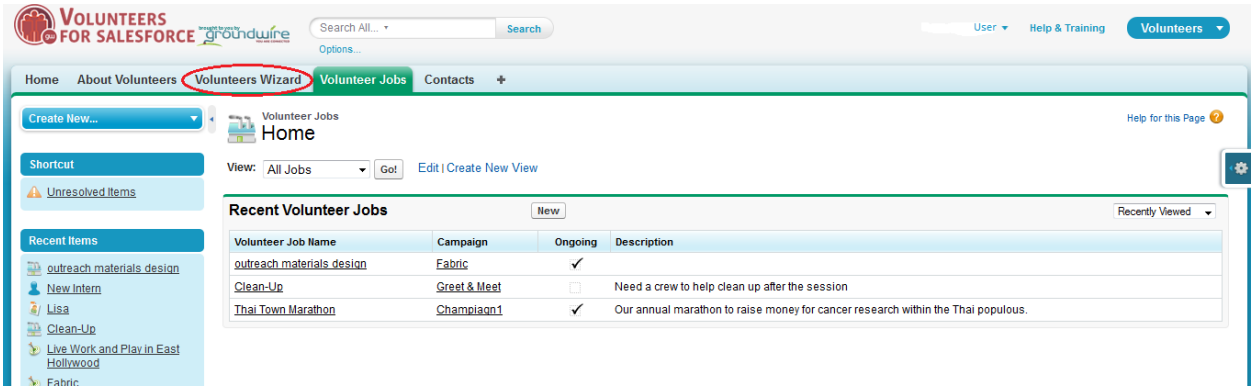


Volunteer Tracking

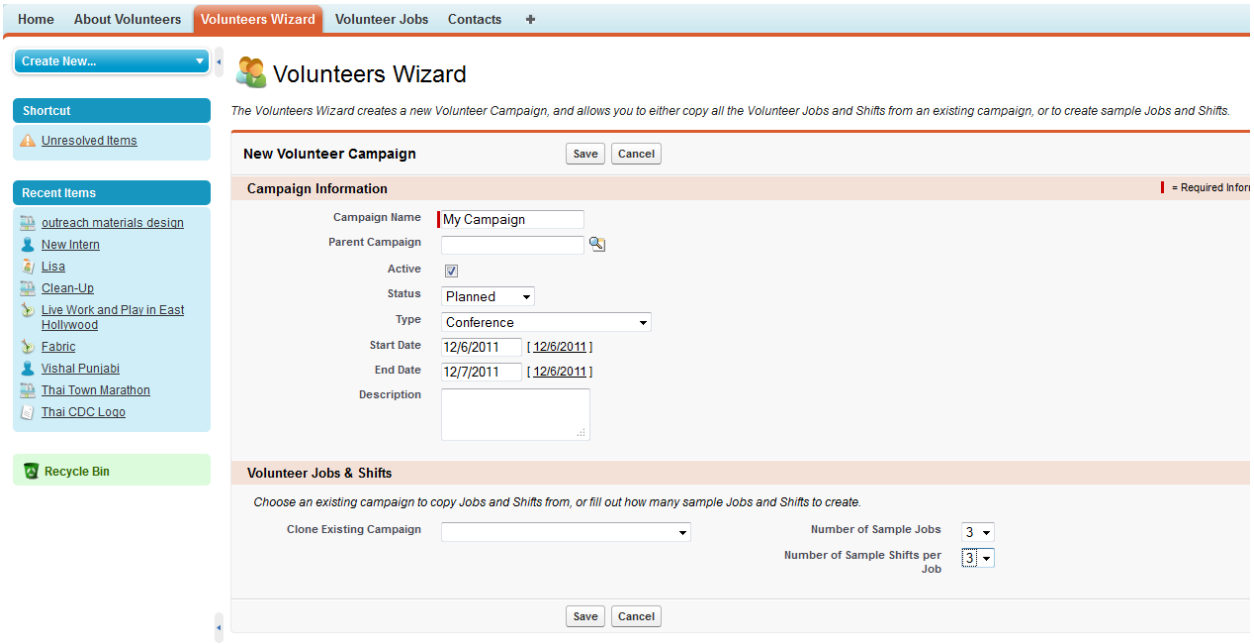
Volunteer Campaign via Volunteer Wizard



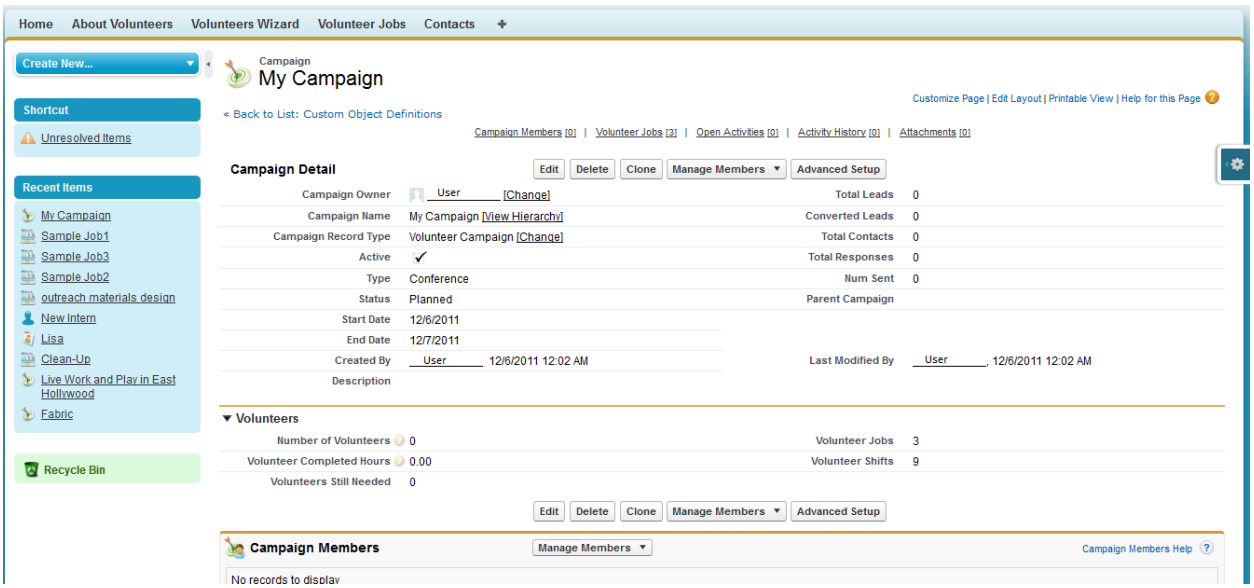
Go into volunteers by clicking the drop down menu that is right most at the top. In the drop down menu click on “Volunteers”.



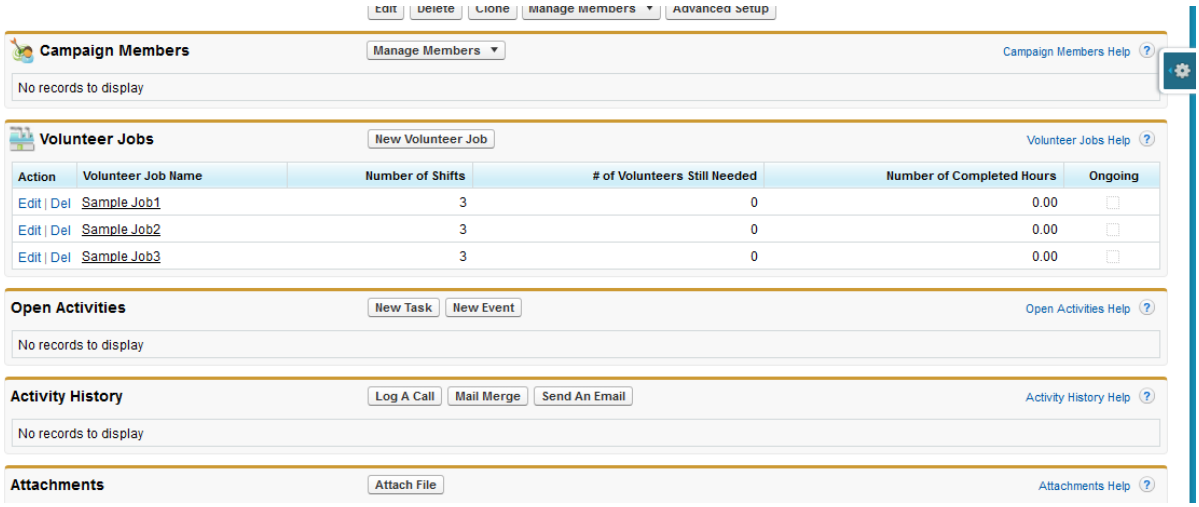
Then click on “Volunteers Wizard” tab at the top.



Clicking on the Volunteers Wizard tab will bring up the Volunteers Wizard form. Here you will need to fill in the Campaign Name. You can make the campaign active, set its status, set the start and end date, and give it a description. At the bottom of the page you can have the campaign copy jobs and shifts from a previous campaign (useful when there are yearly campaigns). Clicking save will create the campaign.

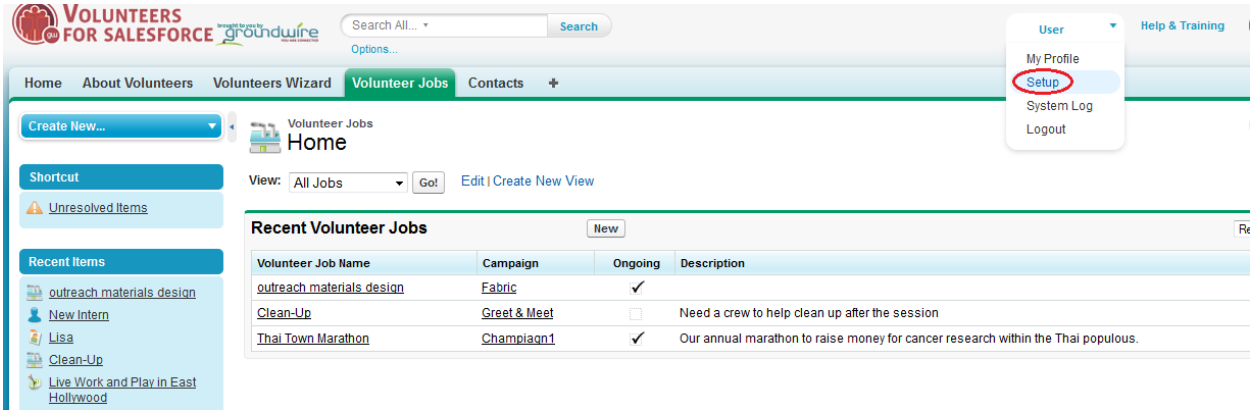


After clicking save you the campaign will be created and you will be displayed this page.

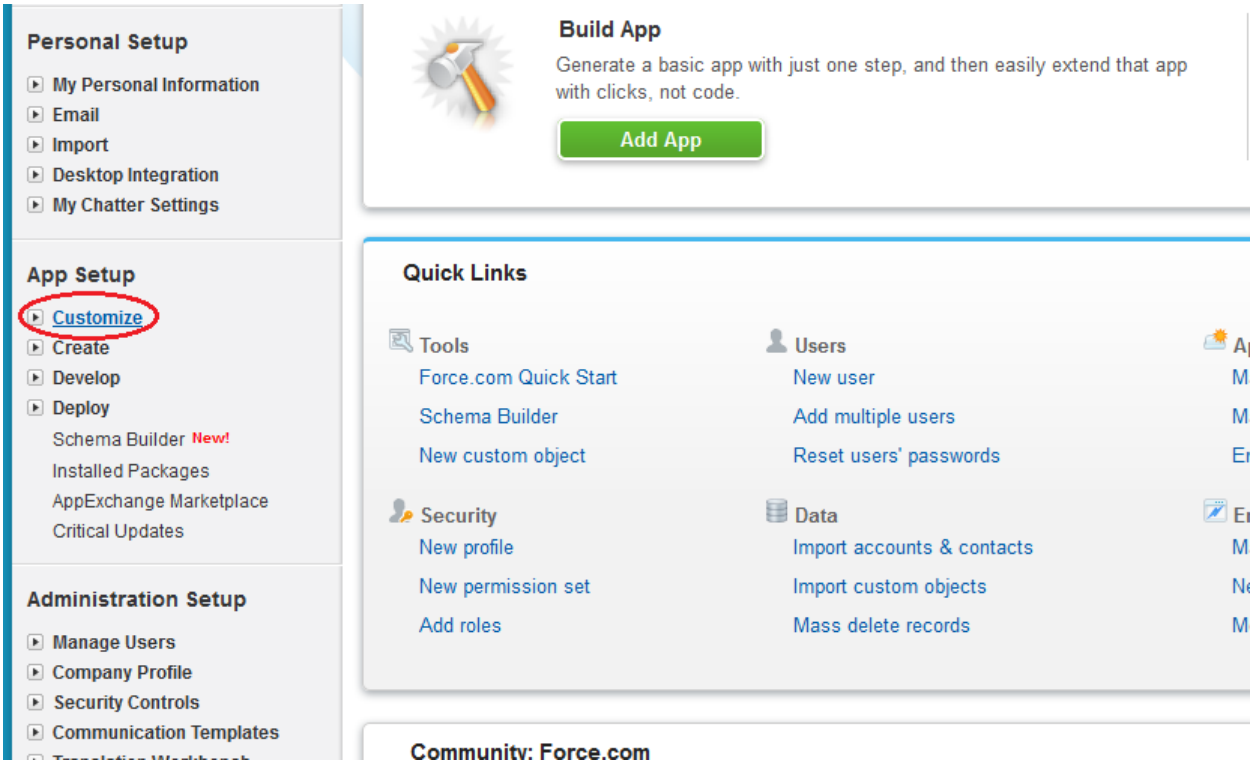


Scrolling to the middle of the campaign page you will find a table called “Volunteer Jobs”. Here you can edit the campaign job details.

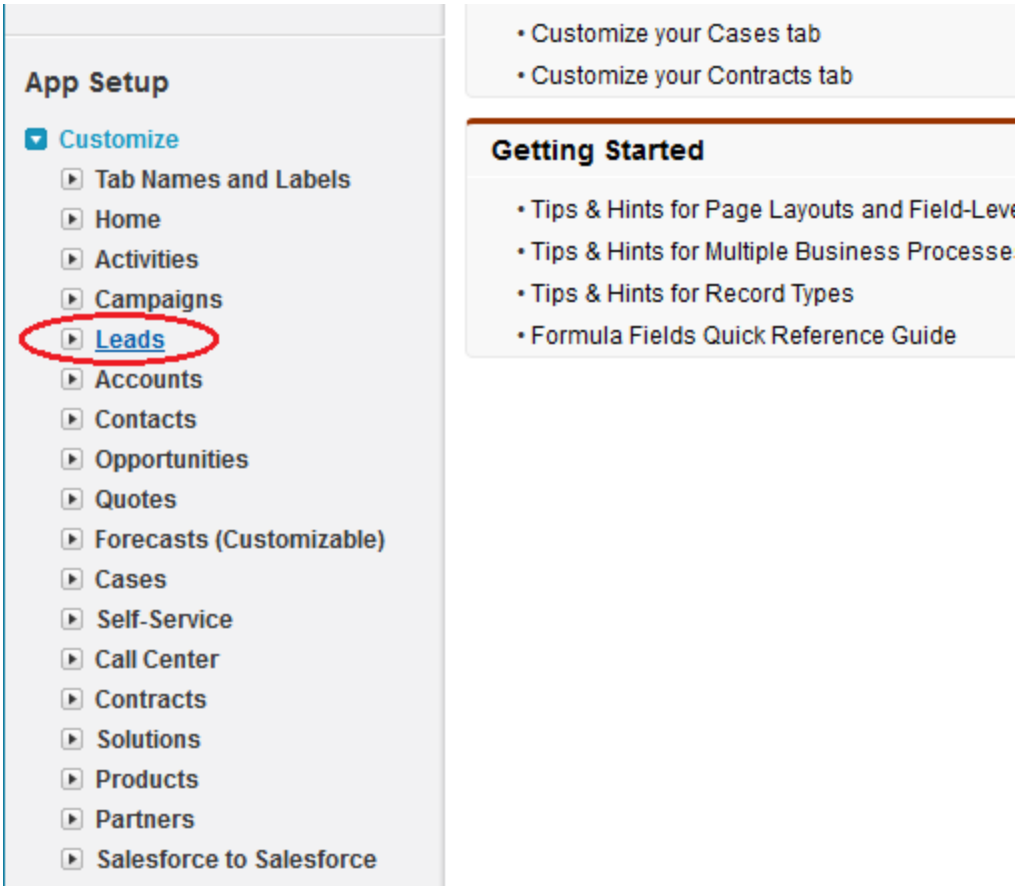
Modifying volunteer skills and availability picklist for contacts and leads



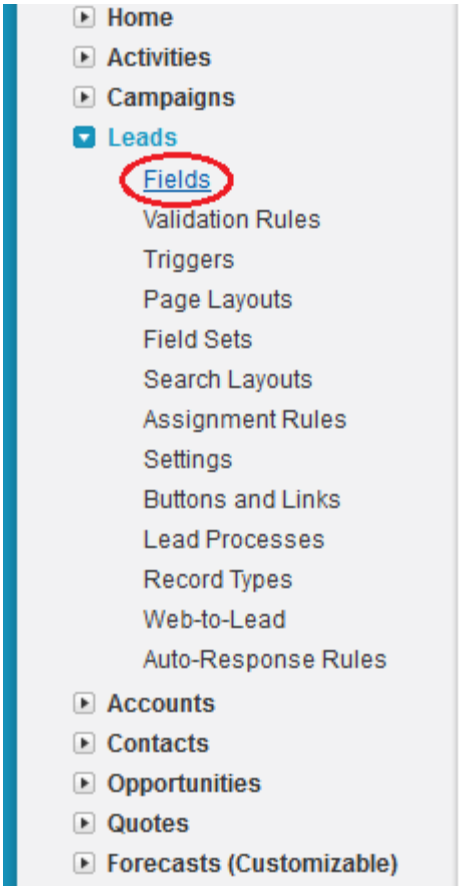
Select “Setup” by clicking your username at the top right of the screen and clicking Setup.



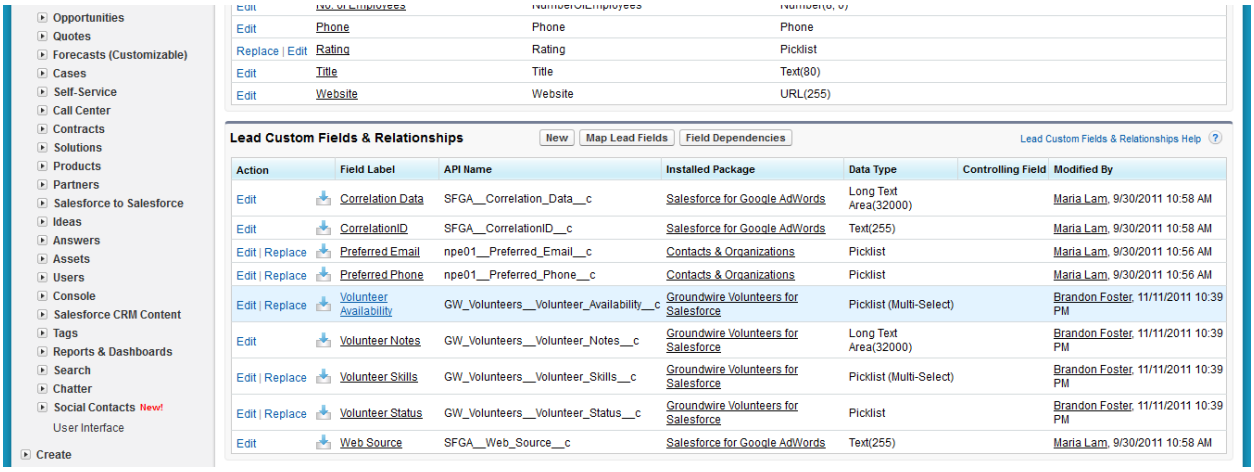
Under App Setup in the left hand column select “Customize”.



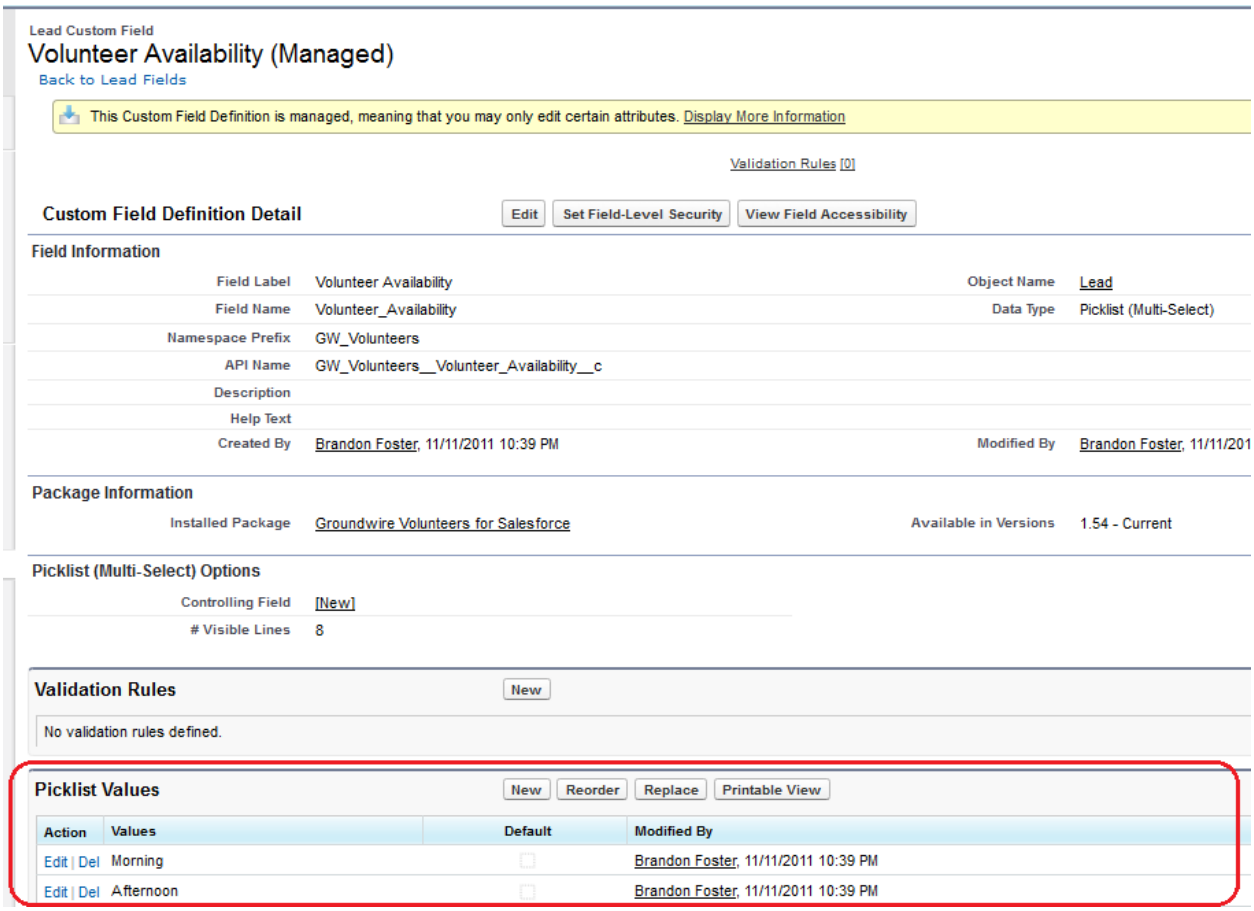
Under Customize select “Leads” to bring up the leads page.



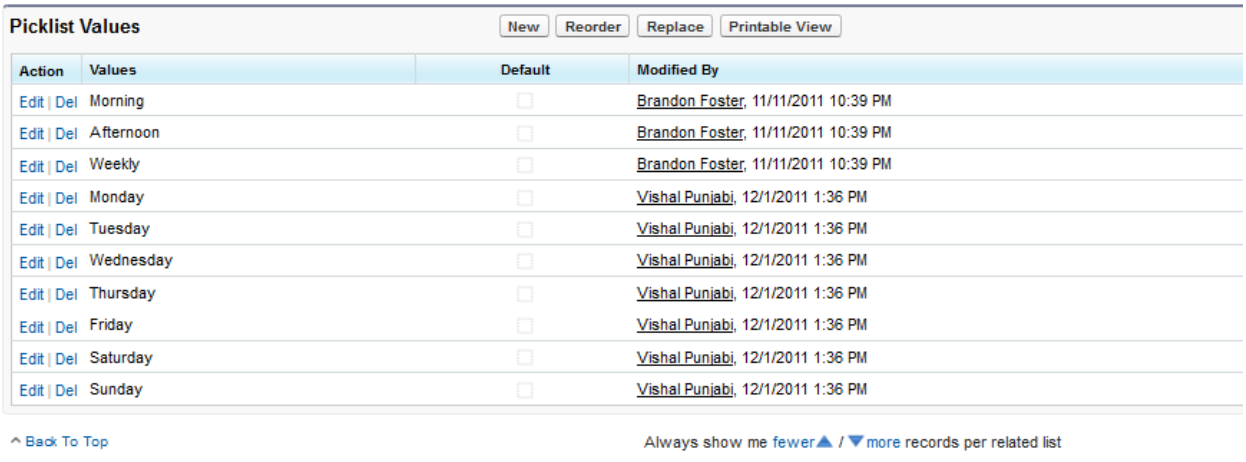
Under Leads select “Fields” to bring up the lead fields page.


Opportunities
Quotes
Forecasts (Customizable)
Cases
Self-Service
Call Center
Contracts
Solutions
Products
Partners
Salesforce to Salesforce
Ideas
Answers
Assets
Users
Console
Salesforce CRM Content
Tags
Reports & Dashboards
Search
Chatter
Social Contacts New!
User Interface
Create
Edit Phone Phone Phone
Replace | Edit Rating Rating Picklist
Edit Title Title Text(80)
Edit Website Website URL(255)
Lead Custom Fields & Relationships
New
Map Lead Fields
Field Dependencies
Lead Custom Fields & Relationships Help
Action
Field Label
API Name
Installed Package
Data Type
Controlling Field
Modified By
Edit Correlation Data SFGA__Correlation_Data__c Salesforce for Google AdWords Long Text Area(32000) Maria Lam, 9/30/2011 10:58 AM
Edit CorrelationID SFGA__CorrelationID__c Salesforce for Google AdWords Text(255) Maria Lam, 9/30/2011 10:58 AM
Edit | Replace Preferred Email npe01__Preferred_Email__c Contacts & Organizations Picklist Maria Lam, 9/30/2011 10:56 AM
Edit | Replace Preferred Phone npe01__Preferred_Phone__c Contacts & Organizations Picklist Maria Lam, 9/30/2011 10:56 AM
Edit | Replace Volunteer Availability GW_Volunteers__Volunteer_Availability__c Groundwire Volunteers for Salesforce Picklist (Multi-Select) Brandon Foster, 11/11/2011 10:39 PM
Edit Volunteer Notes GW_Volunteers__Volunteer_Notes__c Groundwire Volunteers for Salesforce Long Text Area(32000) Brandon Foster, 11/11/2011 10:39 PM
Edit | Replace Volunteer Skills GW_Volunteers__Volunteer_Skills__c Groundwire Volunteers for Salesforce Picklist (Multi-Select) Brandon Foster, 11/11/2011 10:39 PM
Edit | Replace Volunteer Status GW_Volunteers__Volunteer_Status__c Groundwire Volunteers for Salesforce Picklist Brandon Foster, 11/11/2011 10:39 PM
Edit Web Source SFGA__Web_Source__c Salesforce for Google AdWords Text(255) Maria Lam, 9/30/2011 10:58 AM

Select the field you want to edit by click on the field name.



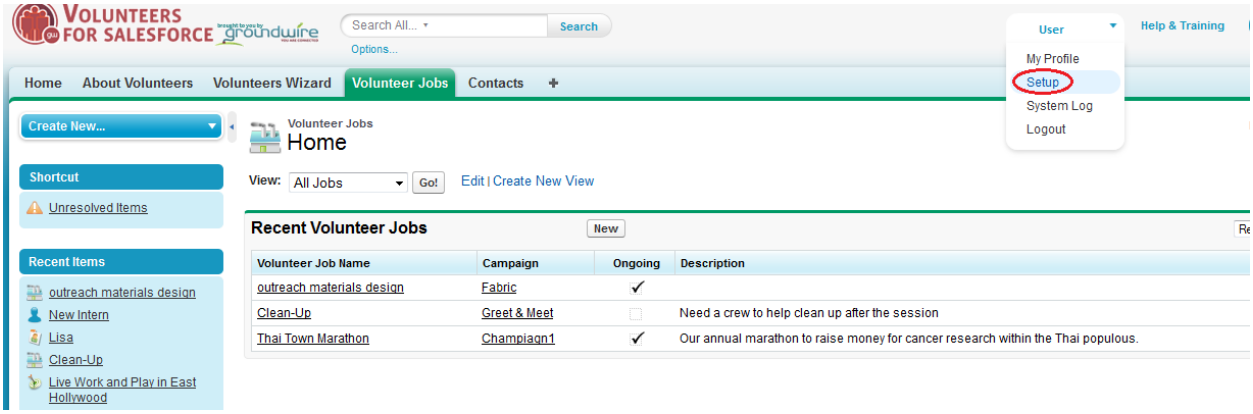
Clicking on the Volunteer Availability field brings up the Volunteer Availability page. Scroll to the bottom to find the Picklist Values table.



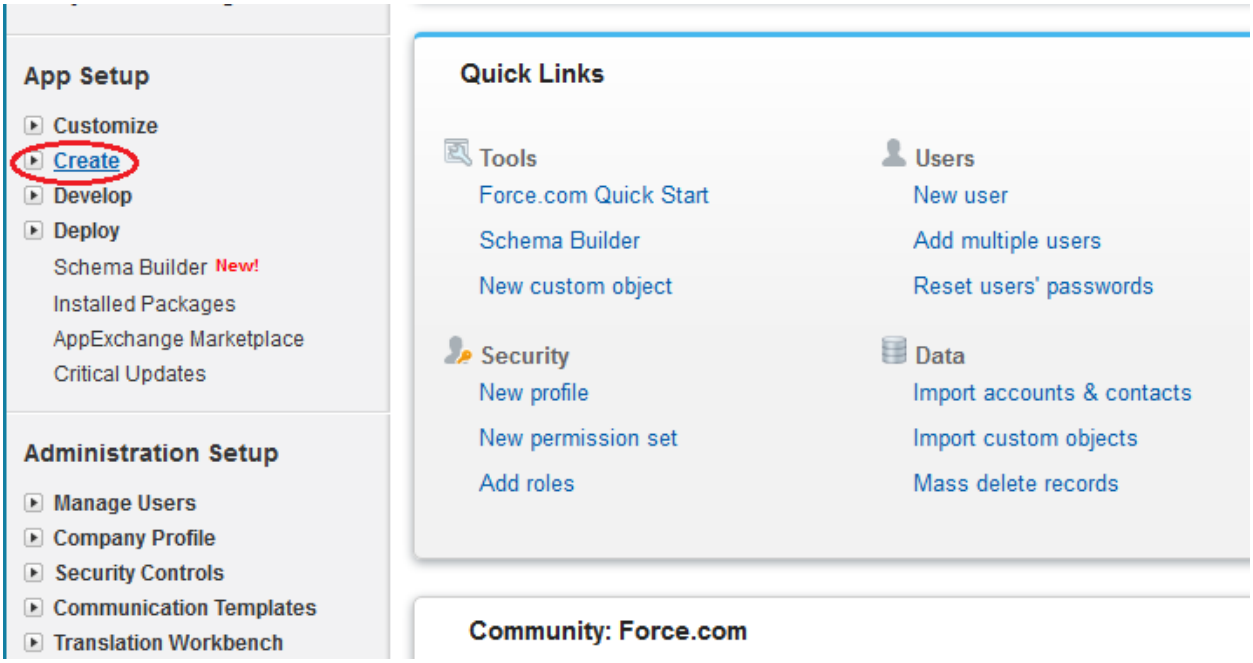
To edit a picklist value click “Edit” to the left of picklist value. To delete a picklist value click “Del” to the left of the picklist value. To add a new picklist value, click the “New” button.

Note: Make sure to have the same set of choices in both the Lead and Contact picklist fields. You must also modify one of these picklists in the Volunteer Job custom object.

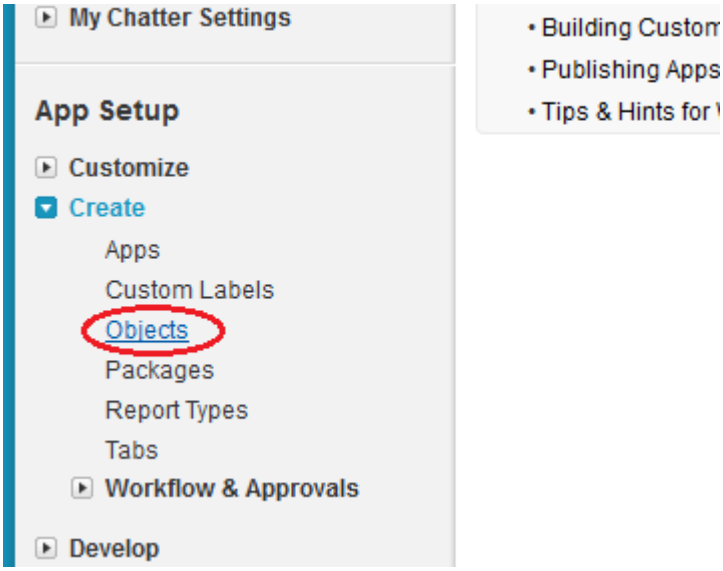
Modifying skills needed under Volunteer Job



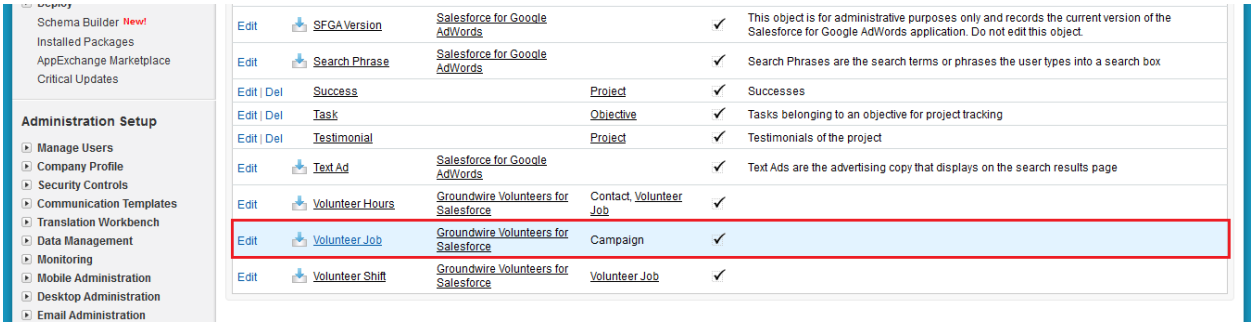
Select “Setup” by clicking your username at the top right of the screen and clicking Setup.



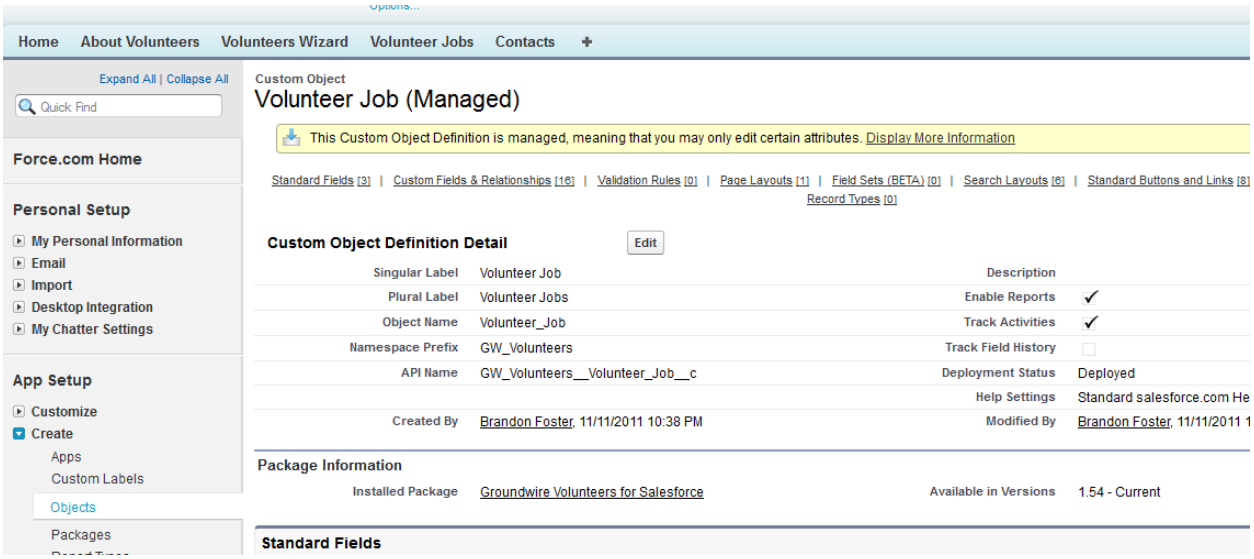
Under App Setup in the left hand column select “Create”.



Under Customize select “Objects” to bring up the objects page.


Schema Builder New!
Installed Packages
AppExchange Marketplace
Critical Updates
Administration Setup
Manage Users
Company Profile
Security Controls
Communication Templates
Translation Workbench
Data Management
Monitoring
Mobile Administration
Desktop Administration
Email Administration
Edit SFGA Version Salesforce for Google AdWords This object is for administrative purposes only and records the current version of the Salesforce for Google AdWords application. Do not edit this object.
Edit Search Phrase Salesforce for Google AdWords Search Phrases are the search terms or phrases the user types into a search box
Edit | Del Success Project Successes
Edit | Del Task Objective Tasks belonging to an objective for project tracking
Edit | Del Testimonial Project Testimonials of the project
Edit Text Ad Salesforce for Google AdWords Text Ads are the advertising copy that displays on the search results page
Edit Volunteer Hours Groundwire Volunteers for Salesforce Contact, Volunteer Job
Edit Volunteer Job Groundwire Volunteers for Salesforce Campaign
Edit Volunteer Shift Groundwire Volunteers for Salesforce Volunteer Job

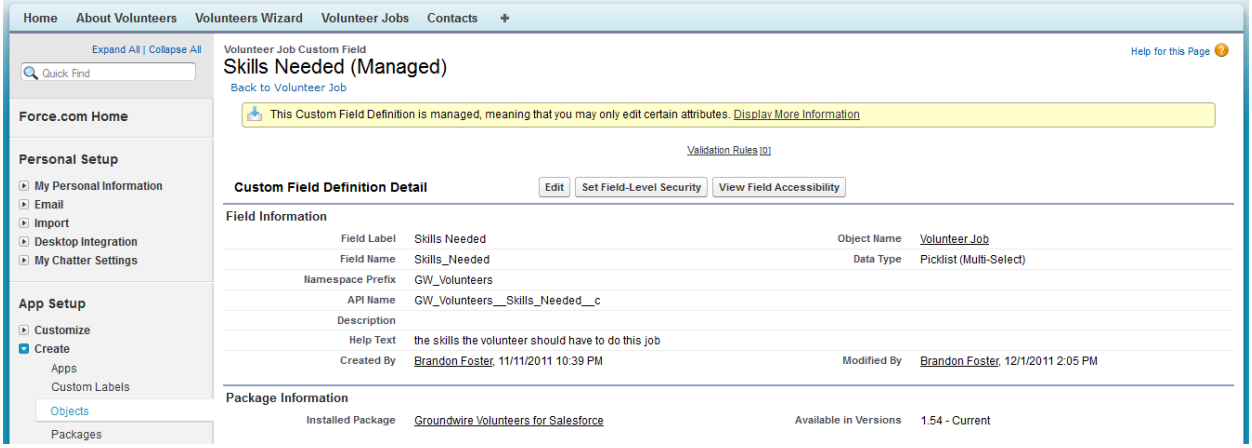
Scroll to the bottom of the objects and find and click on “Volunteer Job”.



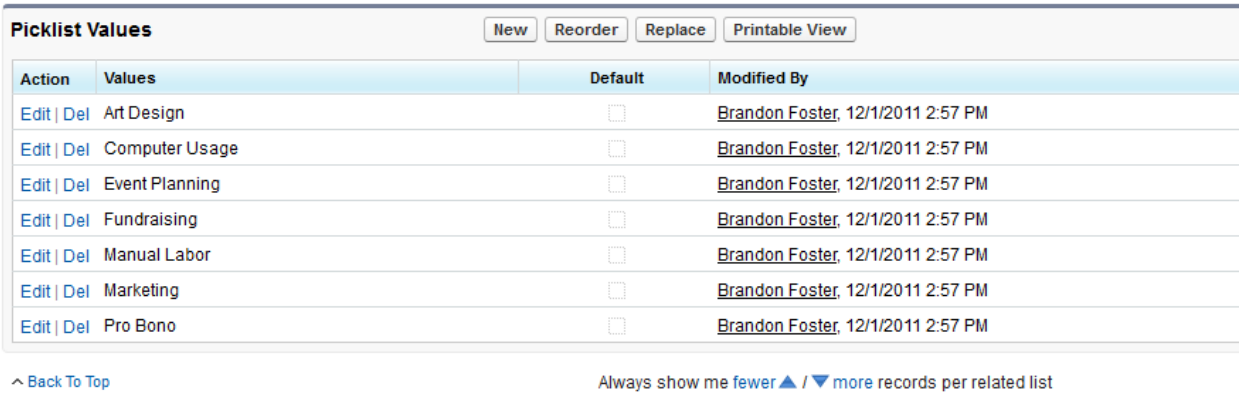
Clicking on the Volunteer Job will bring up the Volunteer Job page.

Edit | Location Zip/Postal Code | GW_Volunteers__Location_Zip_Postal_Code__c | Groundwire Volunteers for Salesforce | Text(100) | Brandon Foster, 11/11/2011 10:39 PM
Edit | Number of Completed Hours | GW_Volunteers__Number_of_Completed_Hours__c | Groundwire Volunteers for Salesforce | Roll-Up Summary (SUM Volunteer Hours) | Brandon Foster, 11/11/2011 10:39 PM
Edit | Number of Shifts | GW_Volunteers__Number_of_Shifts__c | Groundwire Volunteers for Salesforce | Roll-Up Summary (COUNT Volunteer Shift) | Brandon Foster, 11/11/2011 10:39 PM
Edit | Number of Volunteers | GW_Volunteers__Number_of_Volunteers__c | Groundwire Volunteers for Salesforce | Roll-Up Summary (SUM Volunteer Hours) | Brandon Foster, 11/11/2011 10:39 PM
Edit | Ongoing | GW_Volunteers__Ongoing__c | Groundwire Volunteers for Salesforce | Checkbox | Brandon Foster, 11/11/2011 10:39 PM
Edit | Replace | Skills Needed | GW_Volunteers__Skills_Needed__c | Groundwire Volunteers for Salesforce | Picklist (Multi-Select) | Brandon Foster, 12/1/2011 2:05 PM
Related Lookup Filters

Scroll to the bottom of the Volunteer Job page and find and click on “Skills Needed”.



Clicking on Skills Needed will bring up the Skills Needed page.


Picklist Values
New
Reorder
Replace
Printable View
Action | Values | Default | Modified By
Edit | Del | Art Design | Brandon Foster, 12/1/2011 2:57 PM
Edit | Del | Computer Usage | Brandon Foster, 12/1/2011 2:57 PM
Edit | Del | Event Planning | Brandon Foster, 12/1/2011 2:57 PM
Edit | Del | Fundraising | Brandon Foster, 12/1/2011 2:57 PM
Edit | Del | Manual Labor | Brandon Foster, 12/1/2011 2:57 PM
Edit | Del | Marketing | Brandon Foster, 12/1/2011 2:57 PM
Edit | Del | Pro Bono | Brandon Foster, 12/1/2011 2:57 PM
Back To Top
Always show me fewer / more records per related list

Scroll to the bottom of the Skills Needed page to find the picklist. In the picklist you can edit, del or add new picklist values.